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TR@NSENER

Training sessions on reaching European R&I calls and on European proposals writing

UPM, Madrid

14th February 2018

Facilitated by:
Dr Peter Sheard
Ms Celia Gavaud

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Workshop Agenda

14th February

09:00	Module 1 – Opportunity Scouting
10:50	***Break***
11:10	Module 2 – Basics of Writing Competitive Proposals
13:30	***Lunch Break***
14:30	Module 3 – Key Aspects of Successful Coordination (1)
16:00	***Break***
16:20	Module 3 – Key Aspects of Successful Coordination (2)
17:35	Questions and Discussion
18:00	***Close of Day***

15th February

09:00	Module 4 – Exploiting for Impact (1)
10:50	***Break***
11:10	Module 4 – Exploiting for Impact (2)
13:00	***Lunch Break***
14:00	Module 5 – Proposal Development Workshop
15:45	***Break***
16:20	Module 5 – Proposal Development Workshop (Continued)
18:00	***Close of Day***

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Agenda – Module 1

Module 1 – Opportunity Scouting

09:00 Welcome and Introduction

Background to H2020 and policy overview for 2018-2020

Opportunities for funding Energy projects within the EU

H2020 Pillar 3 – Opportunities in the 2018 Energy workplan

Planning your proposal writing

10:45 Questions/Discussion

10:50 Break

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Introduction

Dr Peter Sheard

Trend 2000 Ltd - Managing Director

- Tel: +44 (0)7712 593669
- E-mail: trend.2000@btconnect.com

Background

- BSc in Materials Technology
- BSc in Business Economics
- PhD in Polymer Composites
- Proposal writing since 1988 - Over 100
- Coordinator since 1988 - Over 50
- EU Evaluator since 2001
- NMP, SME, ENV, EeB, ICT
- EU Reviewer since 2005 – SME, Capacities
- PTA since 2012 – 10 NMP projects

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Introduction

Célia Gavaud

Associate at Trend 2000 Ltd
- Tel: +39 389 0671277
- E-mail: celia.gavaud@trend2000.co.uk

Background
- MA in European Affairs
- MA in International Policy and Diplomacy
- Public Affairs Diploma (Postgraduate, NQF7)
- Project Management Institute member (US)

- Proposal writing since 2002 (over 20)
- Coordinator since 2003 (over 15 projects)

Currently Coordinator of H2020 projects
- Risk Finance CSA "PROGRESS-TT"
- ICT RIA "Go-Lab Goes Africa"
- SME Instrument "Cronogard"

Agenda – Module 1

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Why H2020 is important

€80 billion for research funding - €10 billion per year

Open for 7 years: **2014 to 2020**

One of the **largest research funding programmes in the world**

Opportunities usually **flexible in scope** and in general **no restrictions** on the number of projects that you can win

Framework Programme	Budget € Billions
FP1 (84-88)	3.75
FP2 (87-91)	5.4
FP3 (90-94)	6.6
FP4 (94-98)	13.22
FP5 (98-02)	14.96
FP6 (02-06)	17.88
FP7 (07-13)	53.22
H2020 (14-20)	79.27

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Key Drivers for H2020 Strategy

2008-9 economic crisis has wiped out years of progress and exposed major structural weakness:

- **Low growth rate** – *our growth is below that of our main competitors*
- **Unemployment** – *only 69% of adults 20-64 are employed*
- **An aging European population** – *from 1 million over 60's per year to more than 2 million by 2007*

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Key Drivers for H2020 Strategy

In addition long term challenges intensify:

- **Globally interlinked economies** – *Open EU economy facing competition from developing nations (threat & opportunity)*
- **Global finance** – Need for a sustainable and efficient finance system to support growth
- **Climate and resource challenges** – Strong dependence and inefficient use of raw materials vs a growing global population, leading to market vulnerability and climate change

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Key Priorities

A strategy for smart, sustainable and inclusive growth

Smart Growth – *developing an economy based on knowledge and innovation*

Sustainable growth – *promoting a more resource efficient, greener and more competitive economy*

Inclusive growth – *fostering a high-employment economy delivering economic, social and territorial cohesion*

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Europe 2020 - Five headline targets

Five headline targets set to measure our progress towards smart, sustainable & inclusive growth by 2020:

- *75% of the population aged 20 - 64 should be employed*
- *3% of the EU's GDP should be invested in R&D*
- *The 20/20/20 climate/energy targets should be met – greenhouse gas emissions, renewable energy, energy efficiency*
  - *EU's 2030 climate and energy targets, €379 billion investments needed annually over the 2020-2030 period:*
    - *energy efficiency, renewable energy sources and infrastructure*
- *Early school leavers should be <10% and >40% of the younger generation achieving tertiary education*
- *20 million less people should be at risk of poverty*

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Seven Flagship Initiatives

Innovation Union – creating growth and employment from research and innovation

Youth on the move – enhancing education and employment for youth

A digital agenda for Europe – speeding up the roll out and benefit of a high speed digital single market

Energy Union and Climate change – decouple, low carbon, renewable, modernise transport, energy efficiency (SET Plan, Ecodesign Working Plan, STRIA, KICs)

- See EC FACTSHEETS
  - THE NEW ENERGY EFFICIENCY MEASURES
  - THE REVISED RENEWABLE ENERGY DIRECTIVE
  - NEW ELECTRICITY MARKET DESIGN: A FAIR DEAL FOR CONSUMERS
  - NEW ENERGY UNION GOVERNANCE TO DELIVER COMMON GOALS

An industrial policy for the global era – improving the business environment and industrial base

An agenda for new skills and jobs – modernising labour markets and empowering people

European platform against poverty – social and territorial cohesion enabled dignity and social inclusion

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Modernisation of the economy – Role of the Energy Union and Climate Action

- Energy prices affect the competitiveness of the whole economy & represent on average 6% of annual household expenditure
- The energy sector employs close to 2.2 million people, spread over 90,000 enterprises across Europe, representing 2% of total added value

Goals:
- Putting energy efficiency first
- Achieving global leadership in renewable energies
- Providing a fair deal for consumers

Source: EC

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Overview of H2020 Programme

€5.7 billion for societal challenge 'secure, clean and efficient energy'
Combined with other areas of H2020, €10 billion+ funding for clean energy R&I

Excellent Science
- European Research Council (ERC)
- Future and Emerging Technologies (FET)
- Marie Skłodowska-Curie Actions (MSCA)
- Research Infrastructures

Industrial Leadership
- Leadership in Enabling and Industrial Technologies (LEIT)
- Access to Risk Finance
- Innovation in SMEs – The SME Instrument

Societal Challenges
- Health & Wellbeing
- Food Security
- Transport
- Energy
- Climate Action
- Societies
- Security

Widening Participation: Science with and for Society, Mainstreaming of Social Sciences and Humanities (SSH); Mainstreaming of ICT

European Institute of Innovation and Technology (EIT) | EURATOM | Joint Research Centre (JRC)

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Key Information 2018 - 2020

- Realignment of H2020 to EU's current agenda and priorities to better contribute to promoting policy goals of **open innovation, open science and open to the world (3-O's)**
- To make a real and sustainable difference to the quality of life in the EU and strenghten the EU's position worldwide through implementation of the UNDP **Sustainable Development Goals (SDG)**

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Key Information 2018 - 2020

- Emphasis **on open, challenge-led approach** giving flexibility to proposers and focus on **solutions and impacts**
- Final work programme therefore will propose **big mission-oriented, high-impact calls and broader topics**

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Key Information 2018 - 2020

- Continued, increased focus on **innovation**
  - Still more to do, incl. addressing regulatory barriers to innovation and giving special attention to market-creating innovation
- Increased support to **SMEs**
  - Already show substantial achievements
  - Will be developed further for the final work programme

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Key Information 2018 - 2020

- More emphasis on **cross-cutting priorities** in calls and activities through cross-programme integration
  - Climate action and sustainable development
  - Gender equality
  - Social sciences and humanities
- Measures to reverse the trend of falling **international cooperation**
  - Incl. flagship initiatives of large scale
  - Scope on topics dedicated to international cooperation in areas of mutual benefit

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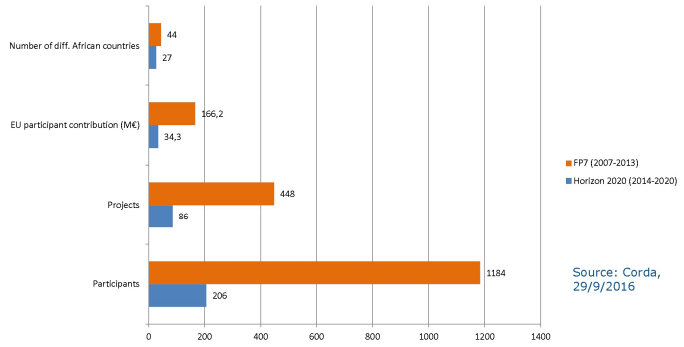
Key Information 2018 - 2020

Example of falling international cooperation FP7 vs H2020

Africa-Collaborative research projects



Source: Corda, 29/9/2016

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Key Information 2018 - 2020

- Horizon 2020 'Simplification Survey' revealed a **desire for further simplification**
  - Can expect to see a new round of simplification plans, focusing on detail improvements rather than fundamental change
- Marked dip in **success rates** compared with FP7
  - Researchers' time spent in preparing proposals should neither be wasted effort, nor perceived as such
  - Measures to be introduced to alleviate low success rates:
    - Further targeted use of 2-stage calls
    - Clearer and better structured expected impact statements in the work programme

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Key Information 2018 - 2020

- Other issues identified
  - Persistent divide in terms of R&I performance between Member States
  - Lack of synergies with other financial instruments
  - Need for an appropriate balance in the Technology Readiness Levels (TRL) of all projects
  - Role of research infrastructures on development of the European Research Area (ERA)

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Key Information 2018 - 2020

- Other issues identified:
  - Further openness by attracting newcomers, especially SMEs
  - Open Science Agenda
    - Dedicated data driven actions
    - Embedding of approaches
    - Mainstreaming/promotion of Open Science principles
  - Ensure Responsible Research and Innovation (RRI) in all work programme parts
  - Need to provide a bridge linking H2020 with “FP9”

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Key Political Context and Drivers

- Increased investment in sustainable development and climate related R&I (2030 targets, Paris Agreement)
  - **"Clean Energy For All Europeans"** COM(2016)860
- Integrating **digitisation** in all industrial technologies and societal challenges (Manufacturing 4.0, Agriculture 4.0, etc.)
- Strengthening international R&I cooperation
- Societal Resilience
  - Security
  - Migration
- Market-creating innovation

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Funding Energy projects in Europe

H2020

FET
MSCA ITN
ERC - Synergy
PILLAR 2 – NMBP
PILLAR 3 – Energy and Cross-cutting areas
Energy
Transport

Fuel Cells and Hydrogen - FCH

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Societal Challenges

Horizon 2020 will continue to address major concerns shared by citizens in Europe and elsewhere.

Brings together resources and knowledge across different fields, technologies and disciplines, including social sciences and the humanities

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Programme Structure

Societal Challenges

- SC1- Health and Wellbeing
- SC2 - Food Security
- SC3 - Transport
- SC4 - Energy
- SC5 - Climate Action
- SC6 - Europe in a Changing World
- Secure Societies

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Energy

Objective

To make the transition to a reliable, affordable, publicly accepted, sustainable and competitive energy system, aiming at reducing fossil fuel dependency in the face of increasingly scarce resources, increasing energy needs and climate change.

Implementation of Strategic Energy Technology Plan (SET Plan)

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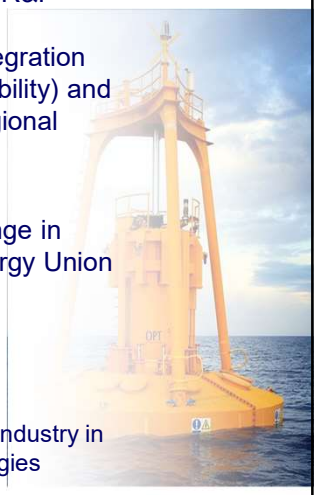
Energy

The Energy Challenge in 2018-2020 will focus on R&I breakthroughs (e.g. emerging technologies with a medium/long-term prospect until deployment), integration (e.g. systems integration, interoperability and flexibility) and facilitating exploitation (taking into account the regional differences in the EU).

The activities supported under the Energy Challenge in 2018-2020 will be structured according to the Energy Union priorities and the SET-Plan key actions:

- To further reduce the carbon footprint of energy
- Enhance the security of energy supply
- Keep energy affordable in the long run
- Increase the global competitiveness of European industry in the field of innovative low-carbon energy technologies



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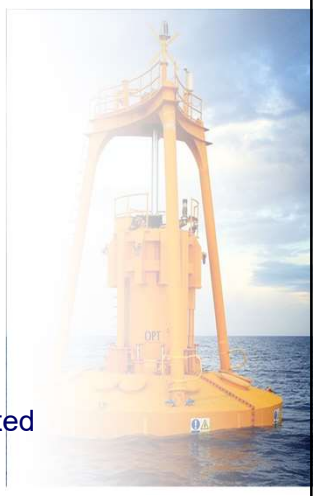
Energy

Key Cross-cutting issues:

- Open innovation and smart financing
- Open to the world
- Digitisation
- Social Sciences and Humanities (SSH)
- Education, Training and Skills:
- Joint actions with Member States/Associated Countries



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Transport

Key Issues Highlighted

- Climate change and the need to mitigate its effects, notably through a tighter integration of the energy, transport and climate challenges
- The decarbonisation of transport, notably through research activities geared towards reducing the dependence of transport on fossil fuels
- Safety and security under different perspectives, including the opportunities and threats posed by automation
- Resilience of the transport system, addressing external hazards and vulnerability to new threats
- Digitisation, automation and general support for disruptive technologies
- Sustainable mobility, including, for the urban dimension, the integration of sustainable modes in traffic/network management
- Environment and health, also in terms of investigating the potential of behavioural change and shift in favour of active travel
- Governance and regulation, with new insights needed into the impacts of wider technology developments, notably connected to automation and big data

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Transport

Specific activities include:

- Towards an integrated, sustainable and robust transport system;
- Technologies transforming the transport system;
- Global leadership, competitiveness, business models and markets;
- Accounting for the people: demand, needs and behaviours; inclusion and access.

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Climate

Climate action, resource efficiency and raw materials

Key Priorities 2018-2020

- Climate action in support of the Paris Agreement
- Circular economy
- Water for our environment, economy and society
- Innovating cities for sustainability and resilience
- Raw materials
- Protecting and valorizing our natural and cultural assets:
  - Earth observation
  - Nature based solutions, disaster risk reduction and natural capital accounting
  - Heritage alive

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Europe in a Changing World

Three main Priorities

- Migration and the refugee crisis
- Cultural and technological transformations for human and social progress
- Governance for the future

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Secure Societies

Five key areas of activity have been identified for the forthcoming funding period:

- Borders and External security
- Fighting Crime and Counter-terrorism
- Secure and Resilient Societies
- Cybersecurity and Digital Privacy
- Competitive European Security Industry

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NMBP

Open Innovation Test Beds for functional materials for building envelopes - 2020

ENERGY EFFICIENT BUILDINGS (EEB)

CLEAN ENERGY THROUGH INNOVATIVE MATERIALS (CE)

Sustainable Process Industries (SPIRE)

Recovery of industrial water, thermal energy and substances contained therein (IA) - 2020

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Other

FUEL CELLS & HYDROGEN 2 JOINT UNDERTAKING

FCH 2 JU is a public-private partnership focusing on the objective of accelerating the commercialization of fuel cell and hydrogen technologies.

Its aim is to contribute to the Union's wider competitiveness goals, leverage private investment, industry-led implementation structure.

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Priorities 2018-2020

ENERGY

- Boosting Europe's global leadership in renewable energy
- Developing a smart citizen-centred energy system, including Smart Cities and Communities
- Strengthening the efficient use of energy in buildings and industry
- Decarbonising the use of fossil fuels

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Implementation 2018-2020

Additional support to each of the strategic orientations is provided through several specific mechanisms:

- Focus areas cover the strategic orientations:
  - Increased investment in sustainable development and climate related R&I
  - Integrating digitisation in all industrial technologies and societal challenges
  - Security part of 'Societal Resilience'
- International flagships will address strategic orientation
  - Strengthening international R&I cooperation
- A potential European Innovation Council will address the strategic orientation 'Market Creating Innovation'

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Focus Areas

Focus areas are expected to create an exceptional impact, addressing 'big ticket' challenges. This focus area approach has been developed in the light of experience from previous Horizon 2020 work programmes, is simpler and has the potential for achieving greater impact.

Focus areas are in effect 'virtual calls', which constitute the linking of topics from respective parts of Horizon 2020 through a new rationale, and thereby unlocking new types of impact and added value.

This will be achieved through aligning aspects of the implementation such as proposal submission deadlines and evaluation procedures, and also putting in place measures to share information and create synergies between ongoing projects throughout the life-cycle (e.g. publicity, project monitoring).

At the same time, the 'contributing' calls and topics will remain within the structure and logic of their respective work programme parts in Horizon 2020. Overall the effect is to get more from the same investment and build critical mass where it is needed.

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Implementation 2018-2020

BUILDING A LOW-CARBON, CLIMATE RESILIENT FUTURE: SECURE, CLEAN AND EFFICIENT ENERGY

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Implementation 2018-2020

Core Challenges:

- On the supply side, cheaper and more performant generation technologies (e.g. renewable energy technologies) which are better integrated in various levels of the energy system;
- a smarter, more flexible and resilient energy system (including affordable and integrated energy storage solutions), taking into account current and future climate change adverse impacts;
- On the demand side, increased overall energy efficiency (e.g. in the EU's building stock) and provision of means to enable consumers to play a more active role in the energy transition;
- a better understanding of the specific socio-economic contexts in which the energy transition takes place which will allow to address obstacles in a more effective way;
- increased market-uptake of innovations, including the implementation of energy policy, the preparation for rolling-out investments, and the support for capacity-building.

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Implementation 2018-2020

- Energy efficiency
- Global leadership in renewables
- Smart and clean energy for consumers
- Smart citizen-centred energy system
- Smart Cities and Communities
- Enabling near-zero CO2 emissions from fossil fuel power plants and carbon intensive industries
- Joint Actions
- Cross-cutting issues

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Implementation 2018-2020

Energy Efficiency

- Upgrading buildings' energy performance and smartness
- Energy efficient industry and services
- Energy efficiency is an investment
- Energy efficiency is an energy source
- Support for policy-driven innovation

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Implementation 2018-2020

Global Leadership in Renewables

- Breakthrough technology development – 'Next Renewable energy solution'
- Renewable energy solutions for implementation at consumer scale (encompassing generation of energy in all its form, starting from electricity only generation to also encompass combined heating and cooling solutions, from domestic to industrial and district scale),
- Renewable energy solutions for implementation at the energy system level (oriented to reduce the costs of electricity generated, to optimise system operation and improve processes and components manufacturing, to provide flexibility to the system), and
- Renewable fuels for transport (aiming both feedstock and process improvements and supporting road, aviation and shipping sectors in particular).
- Market Uptake Support

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Implementation 2018-2020

Smart and Clean Energy for Consumers

Transition requires consumers to change their energy consumption behaviour and increase their uptake of different forms of active demand solutions and services, including collective actions. Remaining regulatory and market barriers for consumers should be addressed and innovative engagement and support schemes should be made more readily available to consumers, allowing for improved understanding of the benefits of engaging actively in the energy system. At the same time, it is important to develop a better understanding of the drivers of consumer acceptance and behaviour change in relation to energy efficiency

- The role of consumers in changing the market through informed decision and collective action
- Consumer engagement and demand response

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Implementation 2018-2020

Smart and Clean Energy for Consumers

In combination with financial interventions and building retrofitting, low-cost measures at the household level and use of renewable energy are key solutions in alleviating energy poverty. Energy distributors under the energy efficiency obligation schemes, and public authorities play a central role in delivering energy efficiency measures and providing sustainable solutions to affected households.

- Mitigating household energy poverty

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Implementation 2018-2020

Smart Citizen Centred Energy System

The topics in this area should contribute to test a certain number of approaches proposed in the legislative package 'Clean Energy for All European' and develop technologies and solutions which will enable these approaches to be implemented under economic conditions.

- Flexibility and retail market options for the distribution grid
- Solutions for increased regional cross-border cooperation in the transmission grid
- Integrated local energy systems (Energy islands)
- Decarbonising energy systems of geographical Islands
- Consumer: Large-scale demonstrations of innovative grid services through demand response, storage and small-scale (RES) generation
- Research on advanced tools and technological development
- Pan-European Forum for R&I on Smart Grids, Flexibility and Local Energy Network
- European Islands Facility - Unlock financing for energy transitions and supporting islands to develop investment concepts

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Implementation 2018-2020

Smart Cities and Communities

To achieve the necessary energy transition in cities, it is essential to increase energy systems integration and to push energy performance levels significantly beyond the levels of current EU building codes and to realize Europe wide deployment of Positive Energy Districts by 2050

Integrated innovative solutions for Positive Energy Blocks/Districts will be developed and tested and performance-monitored in the Lighthouse Cities

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Implementation 2018-2020

Enabling near-zero CO2 emissions from fossil fuel power plants and carbon intensive industries

CCS needs to become a cost-competitive technology and prove its safety (mainly regarding pipeline transportation and storage), so that it could start to be commercially deployed and thus contribute to the low-carbon transition of the European economy. Key challenges are the demonstration of the full CCS chain, the reduction of the energy penalty and cost of capture, the detailed appraisal of cost-effective storage capacity in selected regions, and establishing the necessary infrastructure for CO2 transport.

- Advanced CO2 capture technologies
- Conversion of captured CO2
- Strategic planning for CCUS development
- Integrated solutions for flexible operation of fossil fuel power plants through power-to-X-to-power and/or energy storage
- Low carbon industrial production using CCUS
- Geological Storage Pilots

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Implementation 2018-2020

Joint Actions

The objective of topics included in this area is to facilitate the creation or continuation of energy R&I public partnerships between the European Commission and/or countries and regions in Europe and beyond. These public partnerships will have as a goal to contribute to the objectives and ambitions of the Energy Union and the Strategic Energy Technology (SET) Plan, and to continue developing a European Research Area in energy.

- Joint programming actions to foster innovative energy solutions
- Support to the realisation of the Implementation Plans of the SET Plan
- European Pre-Commercial Procurement Programme for Wave Energy Research & Development
- Joint Programming with EU and African partners for a R&I actions in the area of renewable energy

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Implementation 2018-2020

Cross Cutting Actions

- Social Sciences and Humanities (SSH) aspects of the Clean-Energy Transition
- Modelling in support to the transition to a Low-Carbon Energy System in Europe
- Support for the opening of low-carbon energy research databases in Europe
- Support to sectorial fora
- Research, innovation and educational capacities for energy transition
- Transition in coal intensive regions

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Implementation 2018-2020

Schedule of Calls

https://www.trend2000.co.uk/submission-deadlines

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Preparing for Submission

STEP 1

Fully understand the time frame for the proposal development for your specific call

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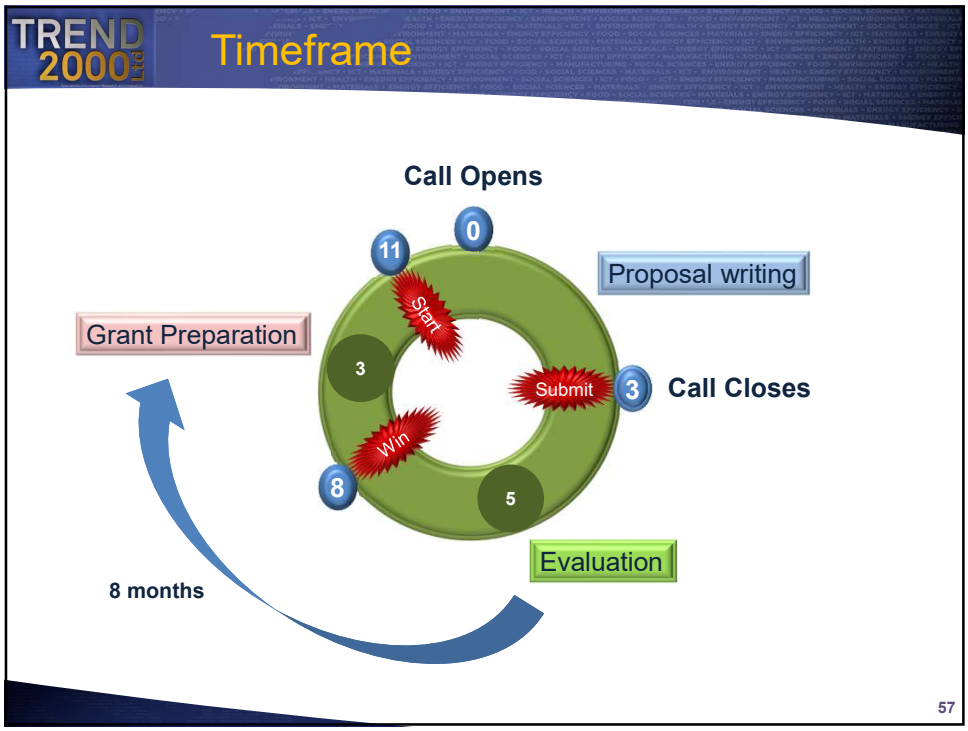

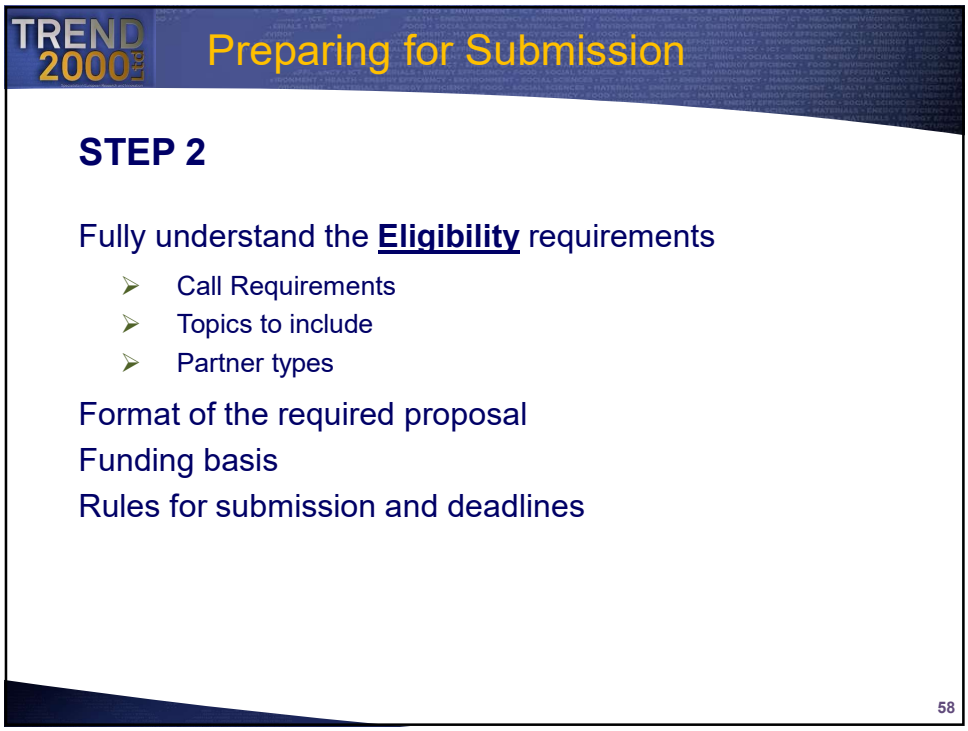

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Preparing for Submission

STEP 3

Fully understand the resources **you** need to commit in order to prepare a top class proposal

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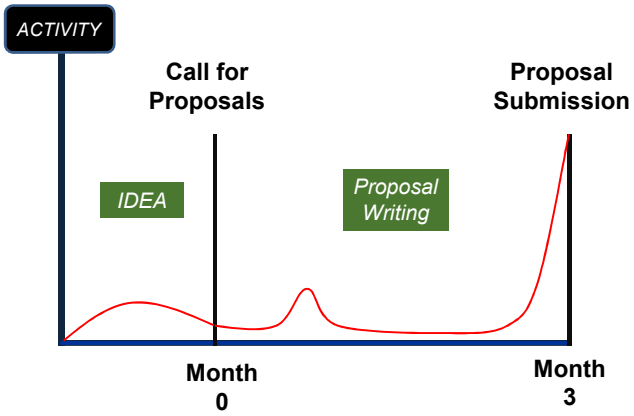
Time Management



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Preparing for Submission

STEP 4

Plan and allocate time and resources and be sure to address all the major development phases

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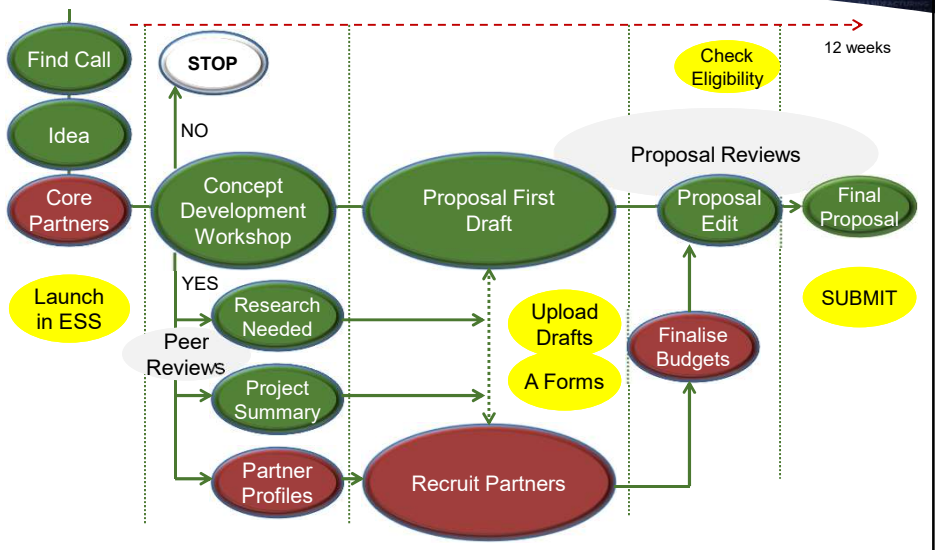
Key Development Phases



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Concept Development

STEP 5

Undertake a brainstorming workshop to develop your ideas for research and check these against the submission requirements

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Concept Development

The Brainstorming Workshop

- Review the project call
  - Identify the key elements
- Identify key stakeholders and needs
  - Problems
  - Scale
  - Context
  - Location
- Review current situation – scientific and technology
  - Define the un-met needs
  - Identify the key drivers
- Define the Idea/Project Concept
  - Summarise the global ambition

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Concept Development

The Brainstorming Workshop

- Identify the current state of the art related to the specific solutions proposed
  - What are its limitations
  - Alternative solutions
  - What is missing and needs to be developed
- Identify how innovative your project is going to be
- Provide an overview of the main project objectives and associated deliverables
- Develop an overview of the project work plan

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Proposal Preparation

Outputs of the Brainstorming Workshop

- Identified the key skills required to undertake the work
- Reviewed the current core partners and identify additions needed
- Explored the potential impacts from the project
- Established how you can measure success or value
- Developed a list of key actions needed to progress the proposal

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Preparing for Submission

STEP 6

DO YOUR PREPARATORY RESEARCH!

Do not expect to be paid for it and put this as part of your funded project!

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Do your Research

The Basic Research Required – General Points

- Quantify the relevant information to support the proposal
  - Scope
  - Importance
  - Innovation level
  - Partners selected
  - Countries involved
  - Magnitude and reach of the impacts
- Provide all data sources
- Confirm opinions and key statements with valid references
- List all assumptions and explain why they are realistic

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Preparing for Submission

STEP 7

THINK ABOUT IT - A LOT!!

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Thinking Time

PLANNING AND IDEA

THINKING RESEARCHING MAKING NOTES

WRITING

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Preparing for Submission

STEP 8

DO IT!

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Agenda – Module 1

Module 1 – Opportunity Scouting

09:00 Welcome and Introduction

Background to H2020 and Policy Overview for 2018-2020

Opportunities for Funding Energy Projects within the EU

H2020 Pillar 3 – Opportunities in the 2018 Energy Workplan

Planning Your Proposal Writing

10:45 Questions/Discussion

10:50 Break

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Agenda – Module 1

Module 1 – Opportunity Scouting

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Background to H2020 and Policy Overview for 2018-2020

Opportunities for Funding Energy Projects within the EU

H2020 Pillar 3 – Opportunities in the 2018 Energy Workplan

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10:45 Questions/Discussion

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Agenda – Module 2

Module 2 – Basics of Writing Competitive Proposal

11:10 What evaluators are looking for

Ensuring your proposal is relevant to the call

Understanding stakeholders - exercise

The project storyboard

Developing your project idea - exercise

Developing clear objectives - exercise

Writing style for effective communication

13:30 Lunch Break

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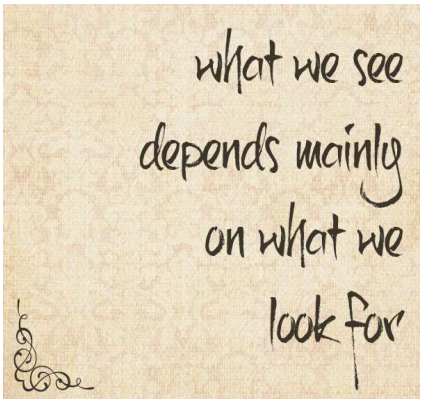
What the EC want to fund



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What the EC want to fund

Understand what the EC wants

- ~~You ask the EC to fund your research~~

- You help the EU to solve its problems!

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Understand what the EC want

Find a relevant call

- Understand the EC priorities
- Read and discuss the Work Programme
- Understand background policy driving the call
- Understand existing State of the Art (SOA)

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Understand what the EC want

Do you have a proposal that:

- Meets the EC priorities?
- Is innovative and breakthrough in nature?
- Moves significantly beyond the existing SOA?
- Has a sound methodology
- The consortium can actually deliver?
- Is clearly written and coherent?
- Allows the EC to easily monitor your progress?
- Has tangible and measureable objectives and deliverables?
- Has a significant potential impact (Related to the call requirements)?
- Offers value for money?

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Key Messages

- Show you **Understand** the Problems and Needs
  - What the key issues are and who cares
  - What needs to be done to achieve change
- Demonstrate that you have the **best Ideas**
  - The barriers that need to drop
  - Outputs to make the changes
- Show you have the **best Methodology**
  - Platform science, platform technology
  - Methods
  - In depth knowledge of all relevant fields
- Illustrate that you are the **best team to Deliver!**
  - Tools (Case studies)
  - Participants
  - Strategy

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Agenda – Module 2

Module 2 – Basics of Writing Competitive Proposal

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Addressing Relevance

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Relevance Significance

- Relevance of your objectives to the scope of the call is an important evaluation criteria
- Only those proposals that directly align with the call objectives will be funded
- Proposals that do not are likely to score poorly or may even be deemed ineligible
- **Avoid trying to impose your own research agenda**

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Understanding the call text

The most effective way to interpret the H2020 call topic and ensuring relevance of your concept is to:

- Read through the call topic text in detail highlighting all of the key words and phrases that describe the scope and essential requirements of the call topic
- Analyse your concept with respect to the call and highlight essential requirements to evaluate relevance and alignment
- Identify areas of non-alignment and consider how you can change, develop or expand the concept to maximise alignment?

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LC-SC3-RES-1-2019-2020: Next gen - renewable energy technologies

Specific Challenge:

The renewable energy technologies that will form the backbone of the energy system by 2030 and 2050 are still at an early stage of development today. Bringing these new energy conversion solutions, new renewable energy concepts and innovative renewable energy uses faster to commercialisation, taking into account social acceptance and secure and affordable energy supply, is challenging. These new technologies must not only have a commercial potential but they should also have a lower environmental impact and lower greenhouse gases emissions than the current renewable energy technologies.

Due to the pre-competitive nature of the research activities of this type, particular emphasis is put on including international cooperation opportunities, whenever relevant to the proposal and the domain

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LC-SC3-RES-1-2019-2020: Next gen - renewable energy technologies

Specific Challenge:

The renewable energy technologies that will form the backbone of the energy system by 2030 and 2050 are still at an early stage of development today. Bringing these new energy conversion solutions, new renewable energy concepts and innovative renewable energy uses faster to commercialisation, taking into account social acceptance and secure and affordable energy supply, is challenging. These new technologies must not only have a commercial potential but they should also have a lower environmental impact and lower greenhouse gases emissions than the current renewable energy technologies.

Due to the pre-competitive nature of the research activities of this type, particular emphasis is put on including international cooperation opportunities, whenever relevant to the proposal and the domain

85

LC-SC3-RES-1-2019-2020: Next gen - renewable energy technologies

Scope:

Proposals are expected to bring to TRL 3 or TRL 4 renewable energy technologies that will answer the challenge described. Beside the development of the technology, the proposal will have to clearly address the following related aspects: the potential lower environmental and climate impact on a life cycle basis, the better resource efficiency, issues related to social acceptance or resistance to new energy technologies, related socioeconomic and livelihood issues.

Support will be given to activities which focus on converting renewable energy sources into an energy vector, or the direct application of renewable energy sources.

One of the following technology-specific sub-topics has to be addressed

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LC-SC3-RES-1-2019-2020: Next gen - renewable energy technologies

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Proposals are expected to bring to TRL 3 or TRL 4 renewable energy technologies that will answer the challenge described. Beside the development of the technology, the proposal will have to clearly address the following related aspects: the potential lower environmental and climate impact on a life cycle basis, the better resource efficiency, issues related to social acceptance or resistance to new energy technologies, related socioeconomic and livelihood issues.

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One of the following technology-specific sub-topics has to be addressed

87

LC-SC3-RES-1-2019-2020: Next gen - renewable energy technologies

Scope:

expected TRL 3 or TRL 4 renewable energy technologies
the development of the technology the proposal will
clearly address
lower environmental and climate impact
better resource efficiency
social acceptance resistance to new energy technologies
related socioeconomic livelihood issues

Support will be given focus on
renewable energy sources energy vector or direct
application of renewable energy sources

One sub-topics has to be
addressed

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LC-SC3-RES-1-2019-2020: Next gen - renewable energy technologies

Expected Impact:

On its completion, the project is expected to:

- Advance the knowledge and prove the technological feasibility of the concept including the environmental, social and economic benefits
- The proposal should show its contribution towards establishing a solid European innovation base and building a sustainable renewable energy system contributing to the decarbonisation of our economies
- The proposed solutions are expected to contribute to strengthening the EU leadership on renewables

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Call text summary

By considering the call text in detail, we are able to clearly understand:

- the scope of the call and the essential call requirements
- The Impact that the project is expected to have
- the areas that require further clarification during discussions with your NCP

With this information it is possible for us to clearly identify:

- if our project concept is relevant to the call
- how we could develop the project concept to become more directly aligned to the call objectives

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Make it clear

- Your section 1.2 is about explaining the relevance to the call
- Do not expect the evaluator to work out for themselves how your proposal is relevant to the call
- It is your responsibility to justify relevance

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Agenda – Module 2

Module 2 – Basics of Writing Competitive Proposal

11:10 What evaluators are looking for
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Developing clear objectives - exercise
Writing style for effective communication

13:30 Lunch Break

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Stakeholders

Who Cares about your Research

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Stakeholders

- Who are the **stakeholders**?
  - Researchers, University, Manufacturers, Governments
- What do they **EACH** need?
  - End Users – use it
  - Suppliers – sell it
  - Funder – high level needs – Belief in your investment opportunity
  - Evaluator – personal?…convinced by your proposal
- **Answer the Questions:**
  - **WHO CARES? (The Stakeholders)**
  - **WHY do they care?**

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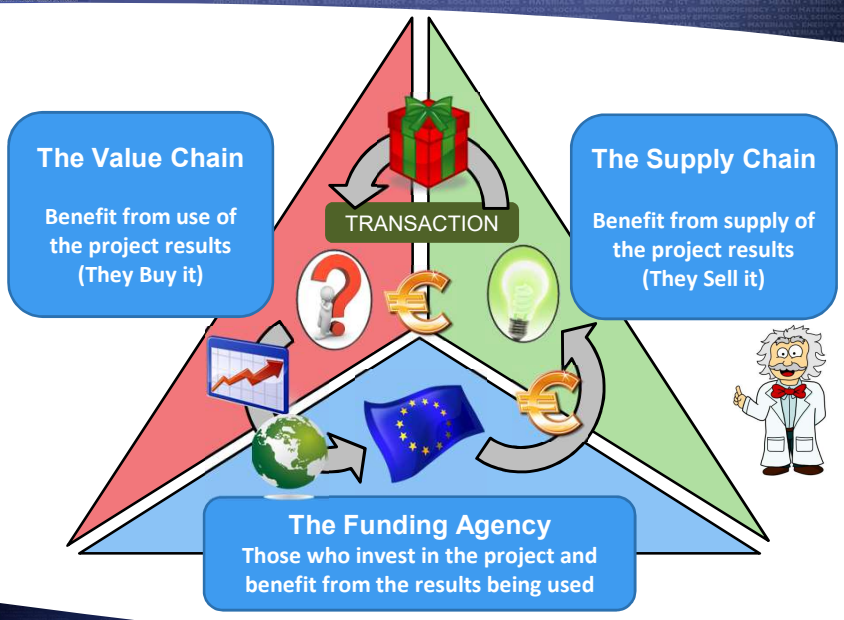
Who are the main project stakeholders?



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Stakeholders - Exercise

You are the owner of a new Renewable Energy Company - ***BULB***

- List all the stakeholders you can think of!

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Stakeholders - Exercise

You are the owner of BULB

- List all the stakeholders you can think of!

1. You – The Owner
2. Your family
3. Staff (IT, Sales, Financial, Technical, customer support)
4. Your staffs' family
5. Customers
6. Potential customers
7. Suppliers of equipment
8. Suppliers of services (energy, water)
9. Renewable energy infrastructure owners
10. Engineering/maintenance services
11. Training organisations
12. Local trade associations
13. Printing companies (brochures, PR)
14. Local authority (waste disposal, roadside signage, building appearance etc.)
15. The bank and/or other investors
16. The landlord/building owner
17. Local media (advertising)
18. Occupants of surrounding buildings
19. Insurance providers
20. Local doctors/hospitals
21. Pest removal services
22. Government – Tax revenues

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Stakeholders - Exercise

You are the owner of BULB

- List all the stakeholders you can think of!

1. You – The Owner
2. Your family
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21. Pest removal services
22. Government – Tax revenues

https://bulb.co.uk/about

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Agenda – Module 2

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13:30 Lunch Break

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The Project Storyboard

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Developing Your Ideas

To obtain funding you need a project with

- Significant **Impact** potential
- Significant scientific and/or technological **Barriers** to overcome

So you need

- To address a tangible European **Problem**
- Have a sound **Concept**
- To develop world class **Science/Technology**

And your concept needs to be achievable

- By your **Consortia**
- Within your declared **Resources**

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Developing the Project Storyboard

- Who has what problem / needs?
- What would they prefer to have?

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Developing the Project Storyboard

- Who has what problem / needs?
- What would they prefer to have?

- What is our solution?
- What features should we have?

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Developing the Project Storyboard

- Who has what problem / needs?
- What would they prefer to have?

- What is our solution?
- What features should we have?

- What features must we **develop**?
- What **new knowledge** do we need to develop?

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Developing the Project Storyboard

- Who has what problem / needs?
- What would they prefer to have?
  - **But they can't**

- What is our solution?
- What features should we have?
  - **But we can't**

- What features must we **develop**?
- What **new knowledge** do we need to develop?

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Developing the Project Storyboard

- Who has what problem / needs?
- What would they prefer to have?
  - **But they can't**

- What is our solution?
- What features should we have?
  - **But we can't**

- What features must we **develop**?
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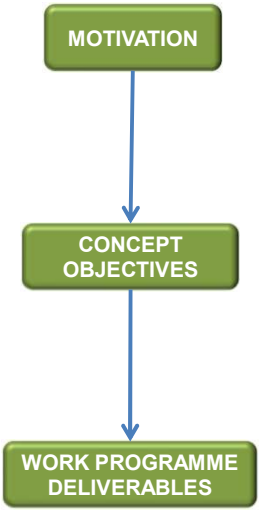

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Storyboard for the Evaluator

Show you fully understand the problems and who owns them

- Define, Locate and Quantify (the 5 whys)
- Who owns them? (Stakeholder Groups)
- What would they like to have instead?
- What is the significance of solving these problems?
- Why can't these problems be solved now? - **BARRIERS**

WHY

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Storyboard for the Evaluator

Show you fully understand the problems and who owns them

- Define, Locate and Quantify (the 5 whys)
- Who owns them? (Stakeholder Groups)
- What would they like to have instead?
- What is the significance of solving these problems?
- Why can't these problems be solved now? - **BARRIERS**

WHY

Explain what you intend to do to address the problems

- What is your solution?
- What features do you need to have?
- Set clear measureable objectives
- Show that these address the call
- What is the state of the art?
- How is your concept novel?
- Why can't it be achieved now? - **BARRIERS**

WHAT

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Storyboard for the Evaluator

Show you fully understand the problems and who owns them

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- Show that these address the call
- What is the state of the art?
- How is your concept novel?
- Why can't it be achieved now? - **BARRIERS**

WHAT

Explain that you have the best Scientific/Technological solution!

- You know the features you need to develop
- You know what scientific/technological developments are required
- You understand the risks
- You have the best approach
- You have the best team

HOW

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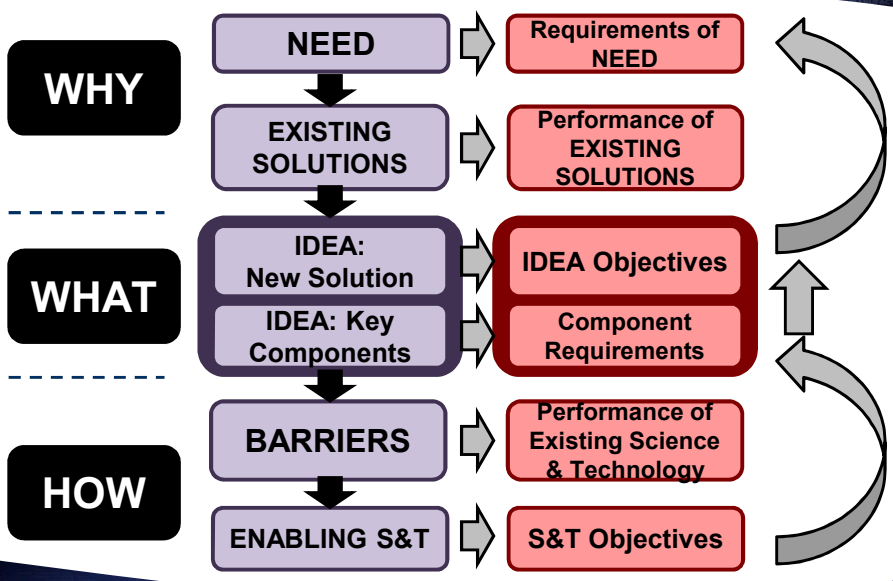
Storyboard summary



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Developing the Project Storyboard

- **It is your main tool for creativity and critiquing:**
  - It helps you to understand the strengths and weaknesses of a project concept (critiquing)
  - Its helps you to understand what jigsaw pieces you are looking for and how they fit together (creativity)
- **It defines very clearly WHAT you are doing and WHY (communication)**
- **It ensures that RESEARCH outputs meet the end-user NEEDS (structure and flow)**
- **It identifies what STAKEHOLDERS need to be involved**

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Agenda – Module 2

Module 2 – Basics of Writing Competitive Proposal

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13:30 Lunch Break

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Exercise

WHY

WHAT

HOW

NEED

EXISTING SOLUTIONS

IDEA: New Solution

IDEA: Key Components

BARRIERS

ENABLING S&T

Create your own project storyboard
for
your own idea
or
one of the following:

- Renewable Storage
- Electric Vehicle
- Energy Efficient Freezer
- Cost Efficient Biogas

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Exercise

Project Storyboard	Explanation
Problem to be solved Problem owners Existing Solutions	
Summary of your Solution Potential Benefits Overall Objectives S&T Barriers	
New Knowledge needed Specific research objectives	

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Agenda – Module 2

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13:30 Lunch Break

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Objectives

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Key Terminologies

Objectives:

- Something that one's efforts or actions are intended to attain or accomplish; a purpose; a goal; a target – help measure progress

Work Packages:

- Project phases broken down into manageable activities aimed at delivering the stated objectives

Deliverables:

- Tangible 'objects' produced as a result of the project intended to be delivered to a stakeholder (either internal or external)

Milestones:

- Events at which a review of achievement is undertaken – Stage Gate - confirming acceptance of results or implementation of contingencies

SMART Objectives

Specific – concise statements defining clearly what will be achieved

Measurable – quantified thereby enabling evaluation of progress and success

Achievable – feasible within the resources and timeframe available to the project consortium

Relevant – to the project concept

Time-Bound – due for completion within a defined timeframe or event

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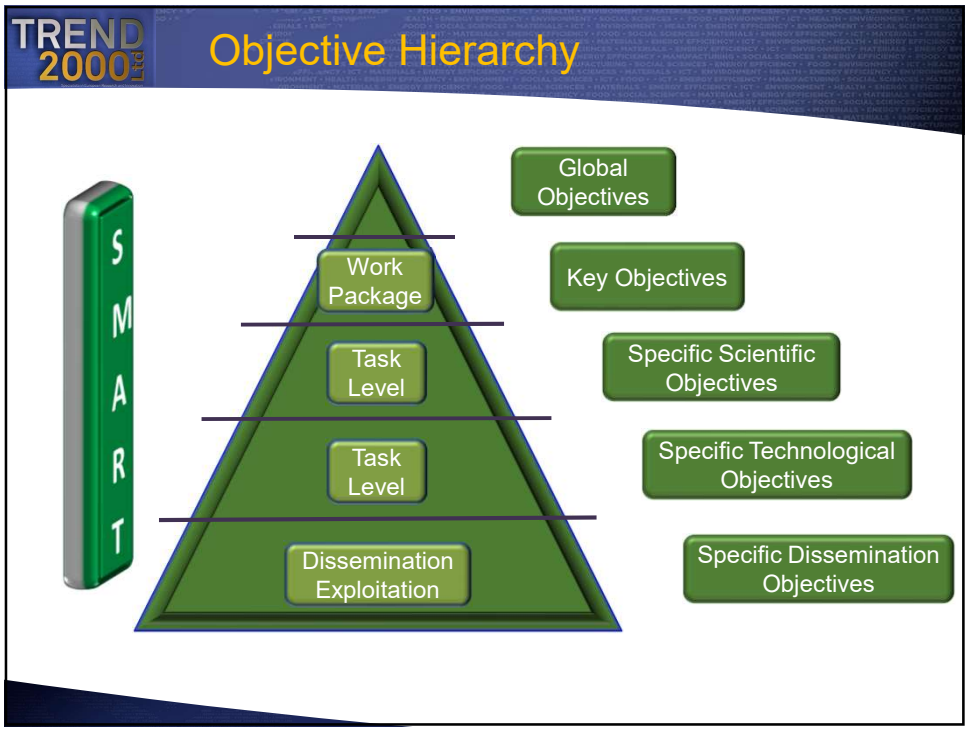

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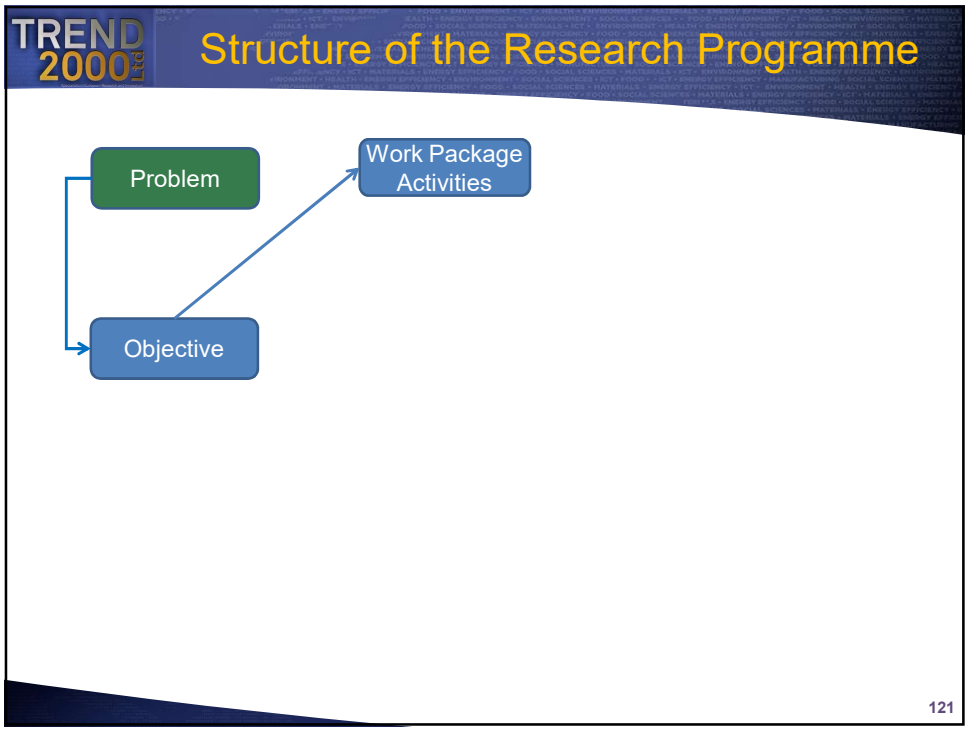

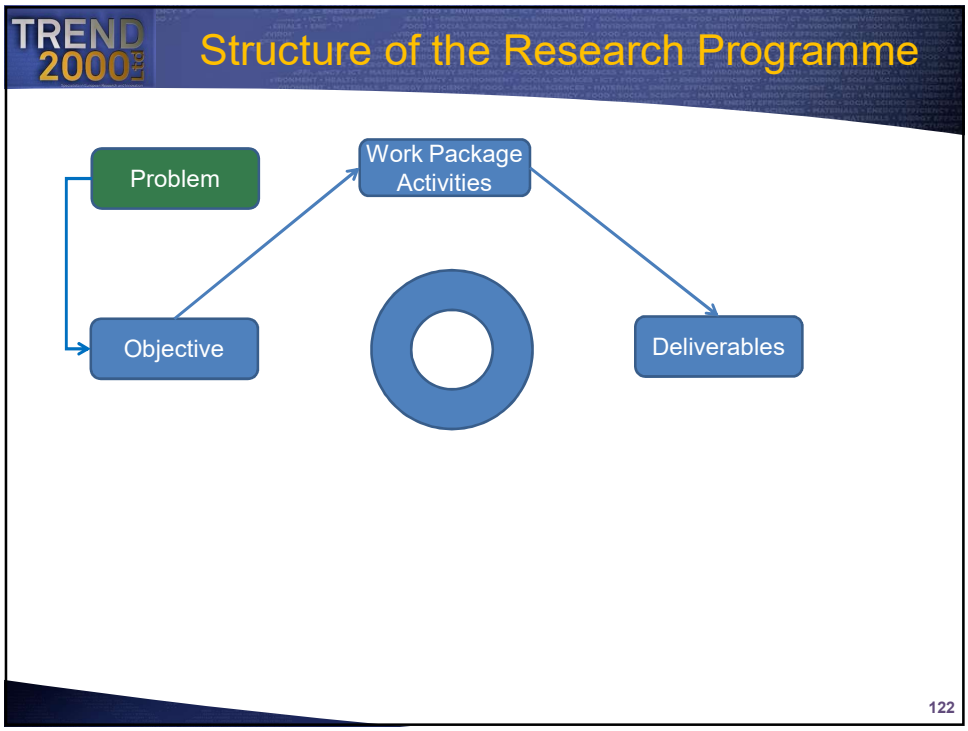

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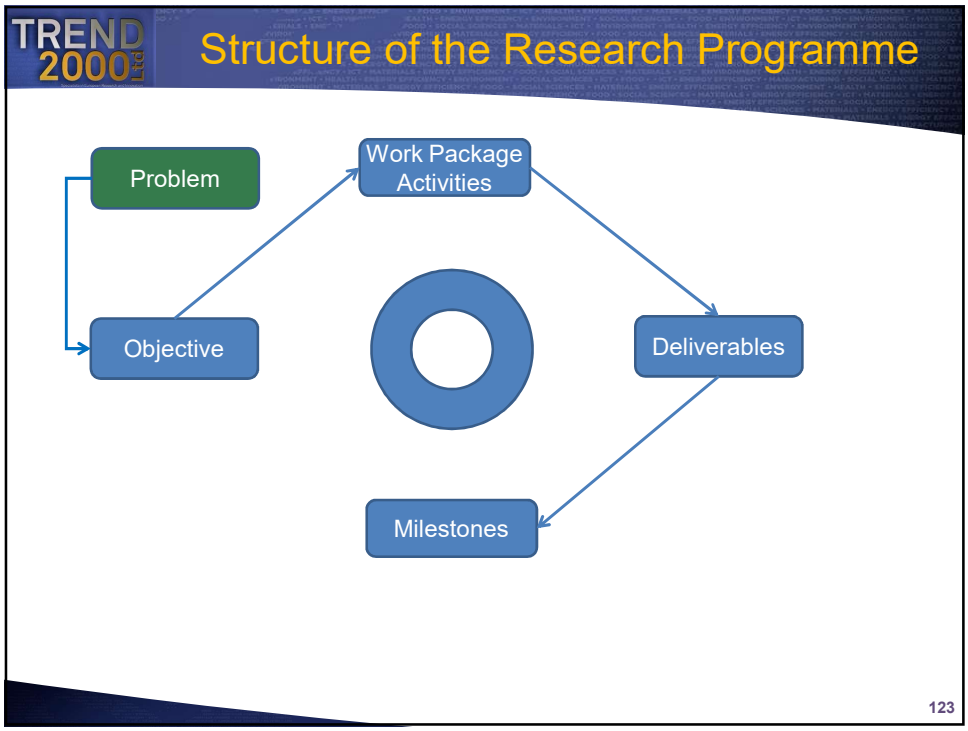

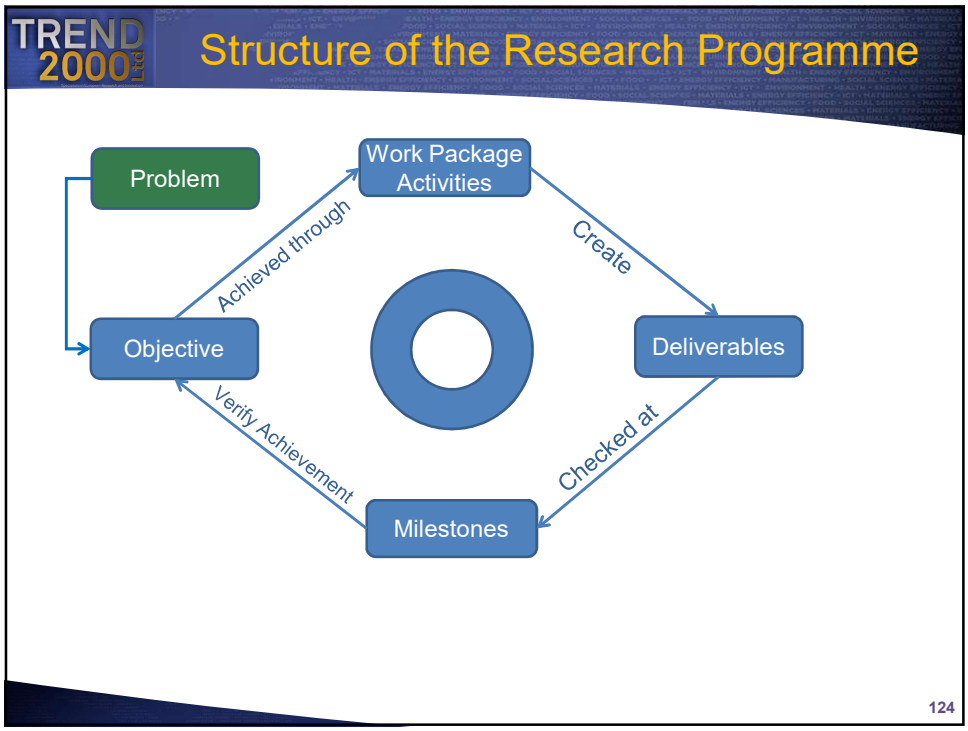

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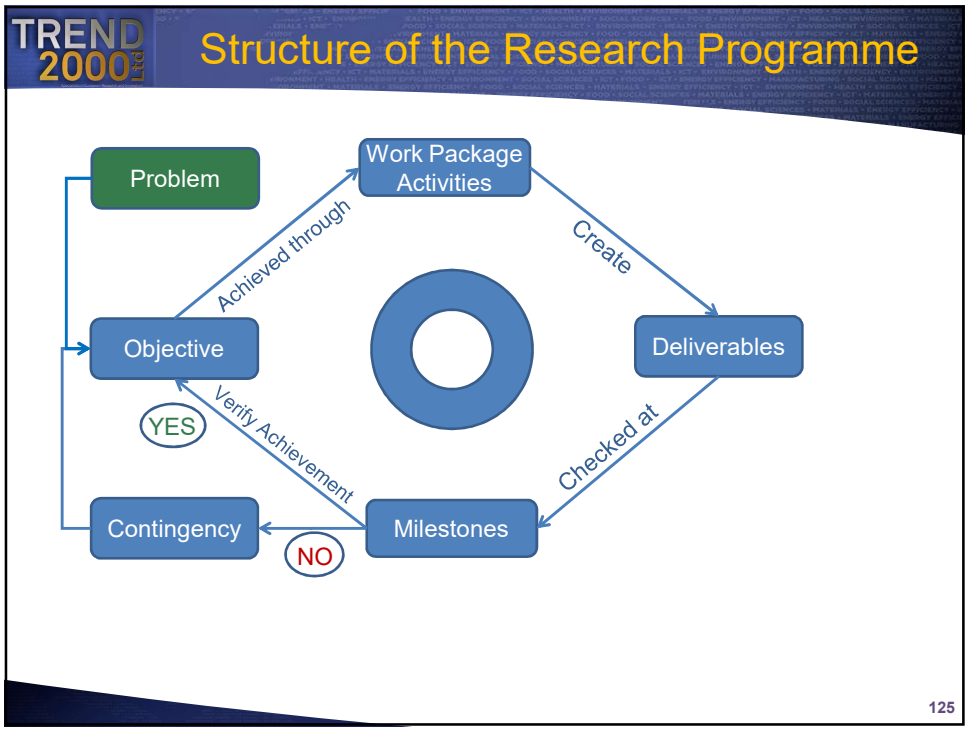

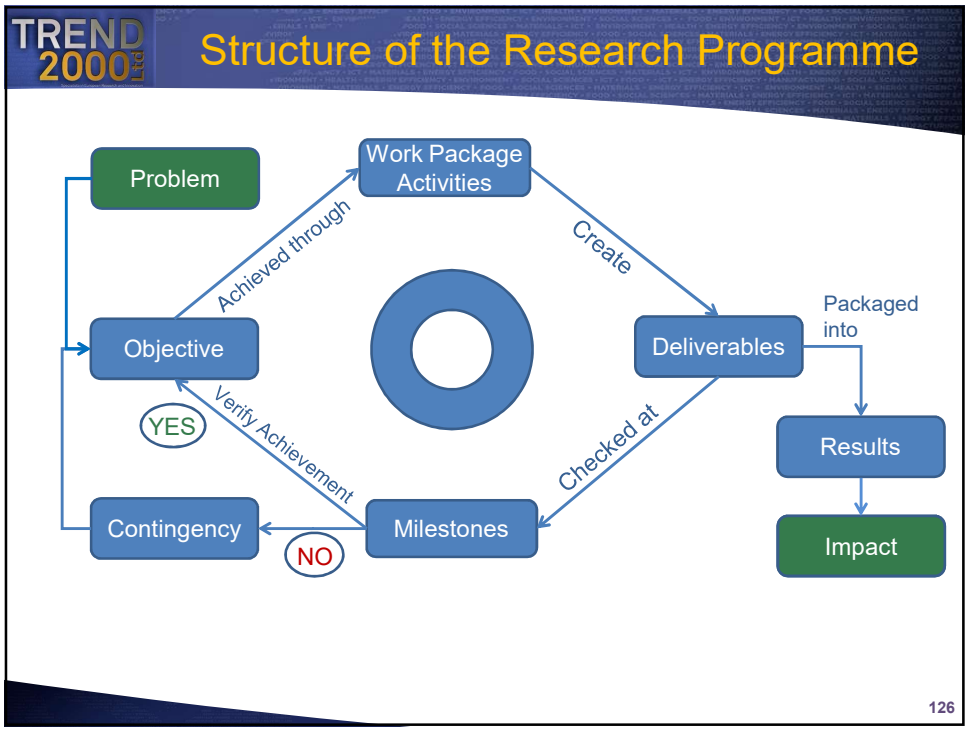

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Practical Exercise

Identify a series of logical tasks for your project

- Identify SMART objectives
- Develop an outline Gantt chart for the major Work Packages
- Present a list of deliverables
- Identify a number of key interim milestones

SMART Objectives
Specific
Measurable
Achievable
Relevant
Timebound

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Agenda – Module 2

Module 2 – Basics of Writing Competitive Proposal

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13:30 Lunch Break

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Know Your Audience

A proposal is intended for **3 key audience groups:**

1. The EC evaluators
2. The project partners
3. The EC project officers

Know your audience:

- Very busy. They will skim-read and read 'between the lines'
- Smart but not necessarily experts "ignorant geniuses"
- Interested in good projects that are likely to achieve results; not just pretty proposals

Writing Skills - Style

Golden Rules – Presentation

REMEMBER

- Write clear simple English
- Space the text out so it is easy to read
- Use paragraphs properly
- Do not repeat the same text throughout the document
  - Can repeat concepts/ideas!
- Do not go mad with bold and underlining
- If someone else thinks it is confusing or unclear – IT IS!!!

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Writing Skills - Style

Golden Rules – Clear English -1

- Aim for an average sentence length of 15-20 words
- Vary between long & short sentences to help the flow and make your points punchy
- One idea per sentence; add another point if it is closely related
- Do not over use technical jargon and abbreviations, unless they are terms ALL your potential evaluators will be familiar with
- Remember that you're writing for the evaluator, rather than yourself
- Use paragraphs and avoid large blocks of text
- Do not use long words when a short one will do

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Writing Skills - Style

Golden Rules – Clear English -2

- Use positive, inspiring language that motivates readers
  - Say how your ideas 'will' solve the ECs problem and how you 'can' save them lots of money
- Avoid negative words, such as 'can't', 'don't' and 'won't'
- Avoid uncertain words, such as 'could', 'should', 'may', 'possibly', particularly when describing the work programme activities and impacts
- Start sentences using connectors to split long ones in two, such as 'but', 'so' and 'because'
- Wield an axe and chop out unnecessary words. Brevity is the basis of clear writing!

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Writing Skills - Style

Golden Rules – Layout

- Stick to the specified font sizes and margins
- Arial is a good one – 11pt minimum
- Stick to the specified page lengths
- Use simple diagrams to help clarify your text
- Use tables to present figures/data more clearly
- Use the section headings provided in the Proposal Template
- Do not mix the content and put under the wrong headings

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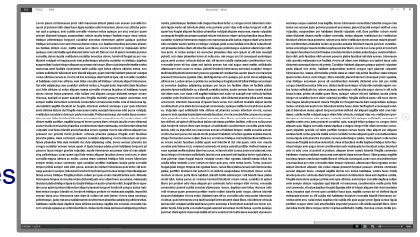
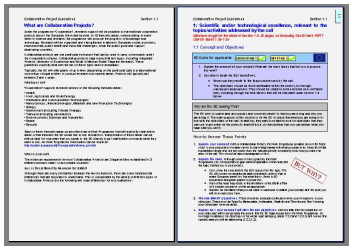
Be Visual – Create Space

A busy page can be difficult to engage with and follow

Create “white space” by:

- Including pictures, diagrams, tables etc…
- Ensure space between lines and paragraphs
- Using bullet points
- Increasing the font size of key headers and positioning them on a line of their own





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Use Bullet Points

Use bullet points to **structure** and **clearly** communicate your messages:

- highlight and draw attention to key messages
- break down complex messages into structured bite-size pieces
- make a page of text more engaging and easier to read

Bullet points are also a useful tool in the **planning** phase

Review & Evaluate Your Work

It is very difficult to review your own work

Read it out aloud

& ask a colleague to check:

- that each message was communicated correctly
- if there were any areas of confusion
- if there is any additional information required to improve understanding

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Agenda – Module 2

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13:30 Lunch Break

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Agenda – Module 3

Module 3 – Key Aspects of Successful Coordination

14:30 The role of the coordinator and personal skills needed
Project management toolkit
Building appropriate consortia

16:00 Coffee Break

16:20 Introduction to IP
Budget considerations for the consortium
17:35 Questions and discussion

18:00 End of day 1

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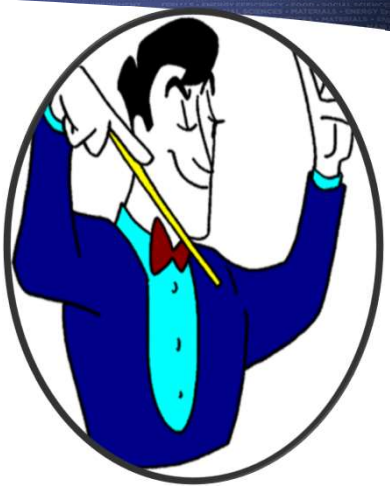
The Coordination Role



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The Coordination Role

Liaison with Commission
- Work Programme
- Mandate
- Main Grant Agreement
- Potential Problems
- Consortium Agreement

Administration
- Filing System
- Financial Issues
- Cost Statements
- Payment Procedure
- Contractual Obligations

Managing the Project
- The Work Plan
- Monitoring Progress
- Communications
- Reporting
- Meetings
- Conflicts

PROCESS MANAGEMENT

PROJECT MANAGEMENT

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The Coordinators Role

Project Coordination is a Team effort!

- Team includes:
  - Coordinator and his/her team, in charge of:
    - Proposal Writing
    - Project management
    - Partner/consortium management
    - Financial management
    - Administrative duties
    - Legal aspects
  - Partners – in charge of their activity management (incl. WP leaders)
  - Research Office (Uni) – Key support
  - EC & reviewers
  - Others? (e.g. experts/observers)

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The Coordination Role

- Leader and Motivator
- Problem Solver
- Contract Preparation
- Time Keeper
- Quality Manager
- Financial Controller

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Coordinator's Tasks Pre-Award

- Develop the proposal Concept
- Ensure relevance and fit to the call
- Develop the work plan
- Create the budget
- Identify, recruit and retain the partners
- Balance effort between the 3 proposal sections
- Write / assemble the draft proposal
- Fill in the A forms (collect partner info)
- Develop the IP process
- Draft Consortium Agreement

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The Coordination Role – Post Award

Intermediary between the partners and the EC

- The main contact point with the Commission/Agencies
  - GA (incl. DOA) preparation and contractual agreements
  - GA amendment
    - Project extension
    - Project delays
    - Partnership changes
  - Reporting – progress and financial
  - Publications – dissemination

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The Coordination Role

- All communication between the consortium and the Commission/Agencies is **via the Participant Portal "electronic exchange system",** incl.:
  - viewing/changing the legal entity data in the Beneficiary Register
  - direct access to the necessary forms and electronic submission for reporting, deliverables and amendments
  - contacting the Commission/Agency, via the *messages* function
  - formal notifications (i.e. when the GA refers to 'formal notifications' or 'formally notify'), via the *formal notifications* function
  - where necessary, *secured electronic signatures* (e.g. for signing the GA, accession to the GA, amendments and financial statements)

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The Coordination Role

Overall administrative management of the project

- Day to day Commission procedures
- Managing and maintaining records through good filing system
- Responsible for the financial and administration coordination
  - Timely submission of reports and cost statements
  - Ensuring prompt payment of financial contributions

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The Coordination Role

Scientific/technical coordination

- Control and monitor technical progress during the project, ensuring that the project schedule is met
- Oversee all work to ensure task sequencing is maintained
- Review progress against budgets and critical path
- Collate all deliverables and milestone reports

Through support of nominated Work Package and Task Leaders

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The Coordination Role

Meetings

- Responsible for the Organisation of Management, Technical and Exploitation meetings
- Provision/collection of the minutes taken at these meetings

Ensure accuracy of the minutes
Ensure acceptance of all minutes taken

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The Coordination Role

The Skills You Need

- Good Communication Skills (Stay in touch with your team, partners and the Commission)
- Technical Knowledge - To write and apply the proposal
- Good Organisation Skills - Keep your paperwork in order
- Awareness of EC requirements - Keep order in the project and other participants
- Leadership skills – Make key decisions

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The Coordination Role

Key things that help

- Good Team in your organisation
- Time to do the job properly
- Clear forward planning
- Good Partners – select them well
- Awareness of the requirements for the role
- Good record keeping
- Strong Consortium Agreement

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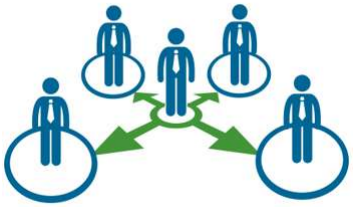
Key to the coordinators role

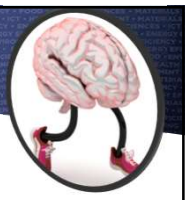
The key to successful Coordination

(APPROPRIATE)

DELEGATION



Exercise



Things that can go wrong!

- You are the coordinator of a H2020 project
- Getting to the Mid Term (M18) of your project
- You are facing 3 challenging situations
  1. Partner “Biotech UK” has not delivered the expected cell culture due at M12
  2. End User “Zytek DE” has been taken over by a large American company; they want to stay in the project
  3. Partner “Centrifuge PL” has internal resources difficulties; they need to leave the project

Explain

- What went wrong with the management process
- What are your next steps?
- Present back to the group!

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Agenda – Module 3

Module 3 – Key Aspects of Successful Coordination

14:30 The role of the coordinator and personal skills needed
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16:00 Coffee Break

16:20 Introduction to IP
Budget considerations for the consortium

17:35 Questions and discussion

18:00 End of day 1

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Project Management Toolkit

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Main Components

- Timecards
- Day Books
- Robust Filing System
- Progress Monitoring
  - 6 Month Task Plan
- Risk Register
- IP Register
- Financial Recording
- Communication Schedules
- Project Minutes
- Action List

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Timecard

Company XXX TIME CARD

Project Acronym **Week No.** XX **W/E** XX/XX/XX

Staff A. Name Person Month cost €

WP/Task No		Sat	Sun	Mon	Tue	Wed	Thur	Fri	Tot
1	1.1								0.0
	1.3								0.0
2	2.2								0.0
2	2.4								0.0

Description of Work	

TOTAL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Signed Approved

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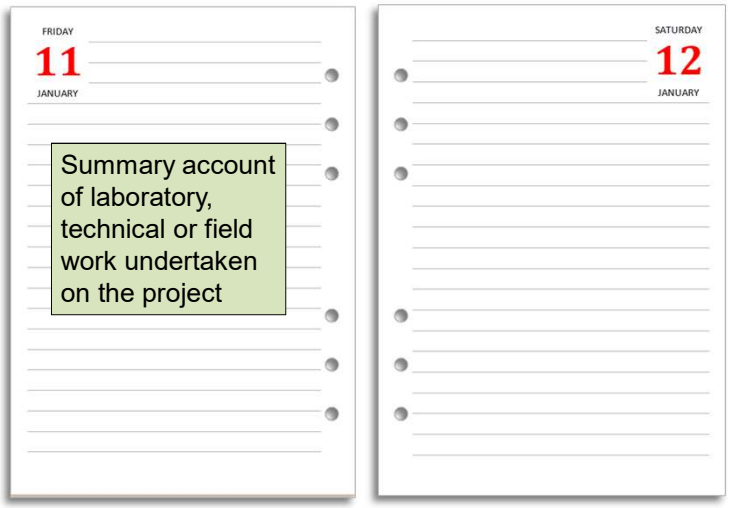
Day Books



Summary account of laboratory, technical or field work undertaken on the project

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Filing System

Contractual Folder(s)

Proposal
Grant Agreement
Consortium Agreement
Claim 1 Payment 1
Claim 2 Payment 2
Final Claim/Payment

Report Folder(s)

Deliverables
Contractual Reports
Periodic Reports
Management Reports
Recruitment Plans
Training Programmes
Supplementary Reports
Final Reports

Communications faxes, letters, e-mail

Contact Details
Meeting Minutes
Management
Technical
Working Party
Exploitation
Formal communications between partners & EC

Supporting Financial Records

Supporting Technical Files

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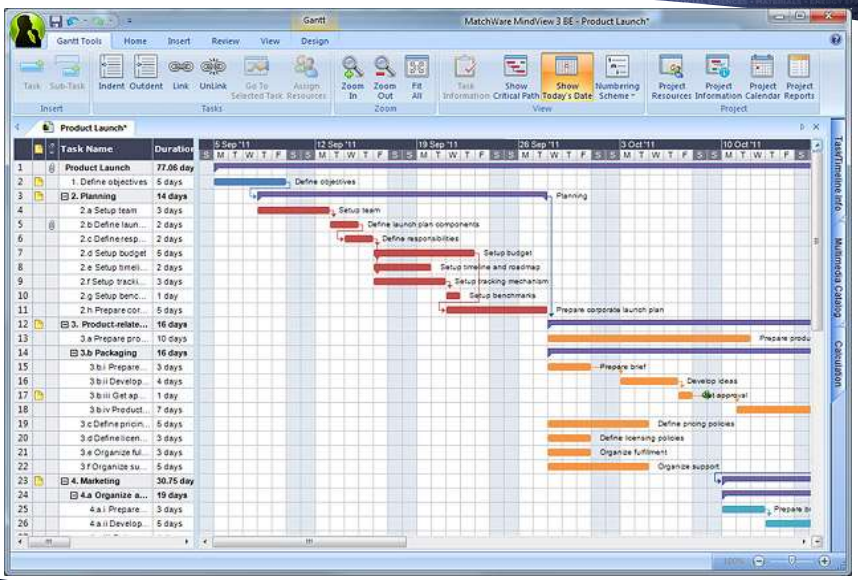
Gantt Chart



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6 Month Task Plan

Action	Task	Owner	Date
Prepare minutes from kick-off meeting	0.1	P1-FG	21-12-16
Write deliverable 2.2 report on recruitment plan	2.2	P6-JK	31-1-17
Training summer school - organise venue/agenda	4.2	P3-PA	2-6-17

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Risk Register

Project						Date of last review	15-Jan-14
Risk ID	Risk Category	Description of Risk	Probability	Impact	Risk Value	Mitigation	Owner
1	Technical	TiO powder not able to disperse effectively on surface	3	2	6	Use a carrier surfactant to transport the powder and separate the individual particles	JC
2	Management	Partner Skudos is being bought by American multinational and may need to leave consortium	3	2	6	Make contact with alternative bio tank producer as a possible replacement	CC
3	Technical	Handling of the glazing before full curing is necessary and may damage the active particle and render the trials less effective	2	2	4	Monitor the particle stability and establish damage in small scale trial. Establish contingency handling practice or protective coating as required	HJ

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IP Register

IP Register

Project No: 67554 - EUROGLAZE

Item No	Date of Entry	Nature	Owner/s	Description	Actions	Date
1	15/05/2013	BGIP	Trend 2000 Ltd	Patent on forming nano layer TiO2 - WP 65548823	None	n/a
2	25/05/2013	BGIP	Medway Windows	Patent on reflective coating - EP 55668893	None	n/a
3	31/09/2013	FGIP	Laing Homes	New window installation process	Seek Patent	30/11/2013
4	29/12/2014	FGIP	Medway Windows	New window catch design	Apply for Registered Design	15/01/2014
5	21/03/2014	FGIP	Polsky Infomation	Novel control interface for window opener	Apply for Utility Model	25/04/2014
6	31/05/2014	FGIP	Trend/Duetsch Tech	Manufacturing process for glass coating	Keep Secret	31/05/2014

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Communication Schedule

COMMUNICATION

Date	Time	Type	Topic	Attending
10-Apr	09:00	Skype	Task 4.2 - Technical Update	DF, Gh, BG, CC
15-Apr	15:30	Telephone	Management - Check on partner Halochem progress with materials purchase	JC,CC
27-Apr	10:30	Email	Email to all re task 7.1 management meeting	CC, ALL
20-May	09:00	Skype	Taks 7.1 - Preparations for Magagement Meeting	CC, DF, PR
25-May	09:00	Face to Face	Task 7.1 - 3rd Management Meeting	

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Meeting Minutes

Notes from Meeting	Actions
AJ opened the meeting and reviewed the minutes from the previous meeting All actions had been completed and all parties accepted the minutes as an accurate record of the meeting	
Taylerflow stated they had a problem with achieving deliverable 3.4 by month 8 since no materials had been provided as yet by Polymorph Polymorph agreed to send the materials on Monday 16th June	○ Polymorph to send materials on Monday 16th June ○ Coordinator to follow up

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Actions List

ACTION LIST

Task	Description	Who	When	Co-ord Chase
1.5	Complete mould design - Seacom A.S	DF	06-May	01-May
4.2	Order TiO nano powder from Geschault	JC	13-May	29 Feb
	Order mould from Precision Unity	DF	15-May	10-May
4.3	Schedule production time on Furnace No1	RT	25-May	25-May
6.3	Complete poster for Paris show	FH	30-May	25-May
	Organise booth at Paris show	GD	02-Apr	02-Apr
7.2	Organise 3rd Management Meeting in Athens	GD	05-Apr	10-Apr
	Partners Mid term reports due	ALL	10-Apr	10-Apr
	Prepare reports for Mid term	CC	25-Apr	

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18:00 End of day 1

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Identifying the Right Partners

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Consortium Development

DO NOT

1. Find a potentially suitable call
2. Contact 10 other universities you work with
3. Sit down and discuss what you should all do

DO

1. Find a potentially suitable call
2. Contact 2 or 3 key partners you know
3. Develop the proposal concept
4. Identify key skills gaps
5. Recruit partners to fill identified gaps

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Consortium Development

Good Quality Partnering is IMPORTANT

- You need to be able to **collaborate remotely** most of the time
- Need partners' **commitment** and **motivation**
  - For the next 3/5 years
  - To work jointly with other partners in the consortium
- Changes in project partners can lead to
  - Significant problems at negotiation
  - Disruptions in the consortium
  - Delays in undertaking the research
  - Distrust with the EC

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Consortium Development

Golden rule: Understand why you are partnering!

Ask yourself a few questions…

- What skills does my project need?
- What type of organisations does my project need?
- What regions would best suit the logic flow of my project?
- Are my partners the best in Europe?
- Do they bring something **UNIQUE** into my project?
- Why would they want to join my project?
- What can I offer them?
- How would this be of value to them?

What additional stakeholders would be of benefit and how are they best included?

Take care of the Eligibility Criteria stated in call

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Developing a Consortium

Other Considerations

International cooperation is encouraged

- Clear **mutual** benefit for knowledge generation and/or new market access
  - With international Cooperation Partner countries (ICPC)
  - Those with S&T cooperation agreements with EU
  - Third countries (not ICPC) may access the funding but on a case by case basis

General rule - do not confuse the evaluator

Every partner - must have a clear and unique role

Every partner - must be logical and explain why they are needed

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Why organisations participate

To understand and justify a partner's participation in a project one must:

- Identify the partners needs and interests that are relevant to the project
- Identify which project results are relevant to these needs
- Understand how the results create benefits that address these needs

INDUSTRY | UNIVERSITY | RESEARCH | GOVERNMENT

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Mobilisation of Resources

When selecting partners you are

- Looking to access the right skills needed for the project
- Gaining access to relevant Background IP
- Accessing specialist equipment
- Gaining access to end user markets

Do not forget about the individual people and their credibility

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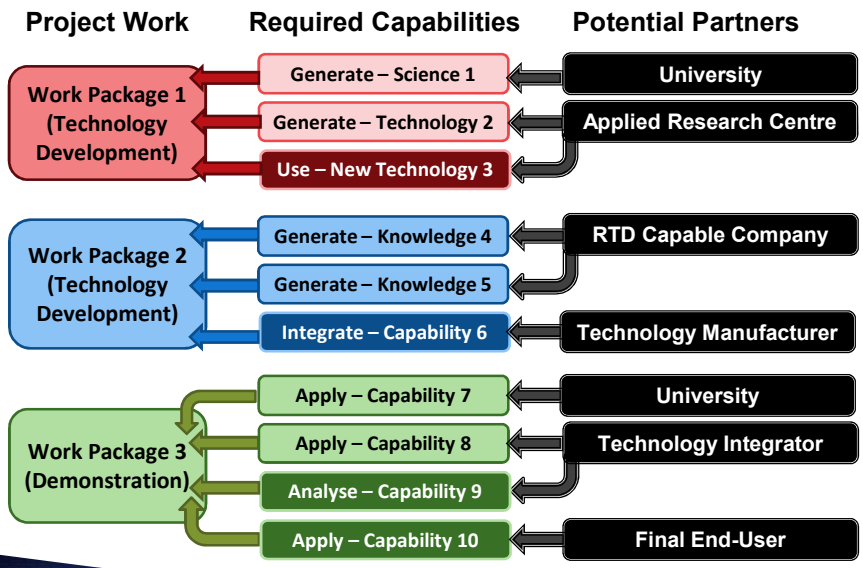
Partner skills integration



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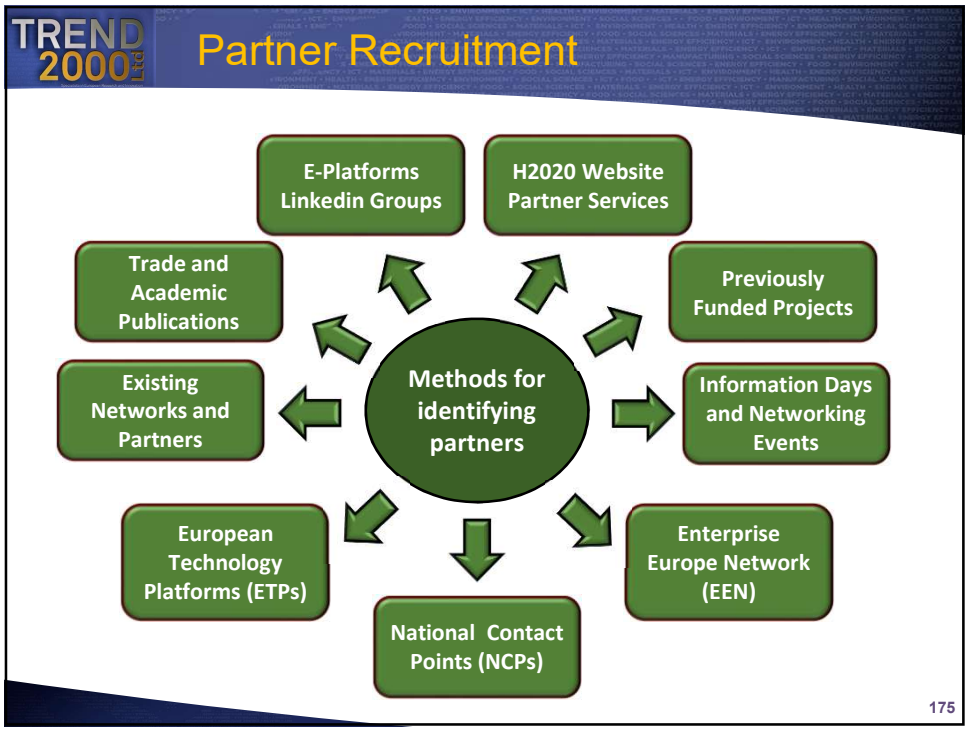

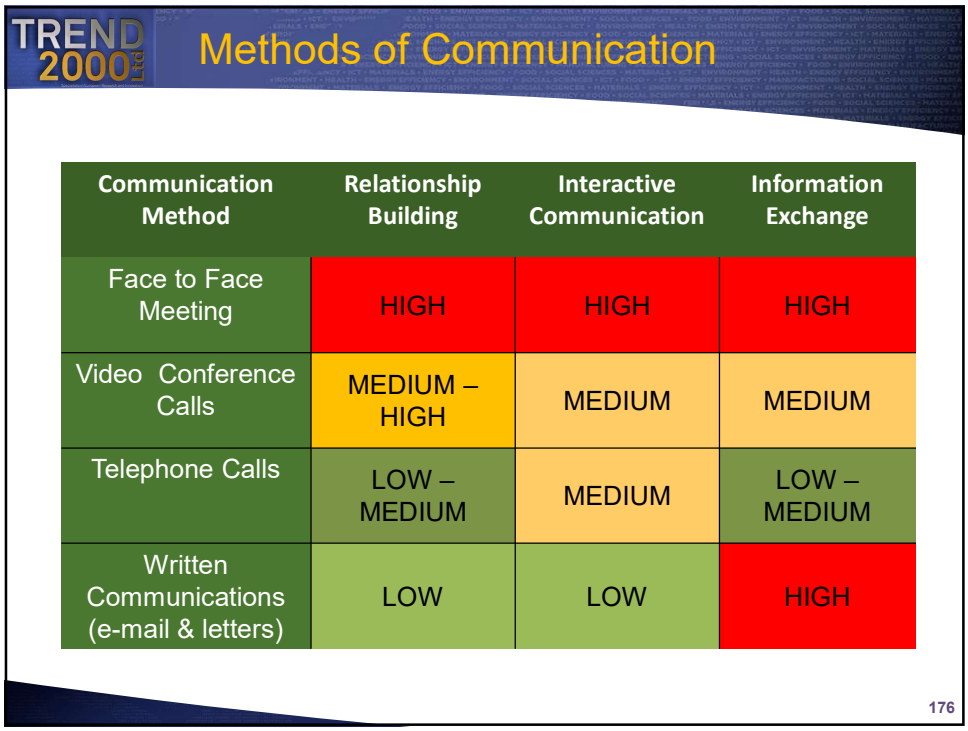

Communication Method	Relationship Building	Interactive Communication	Information Exchange
Face to Face Meeting	HIGH	HIGH	HIGH
Video Conference Calls	MEDIUM – HIGH	MEDIUM	MEDIUM
Telephone Calls	LOW – MEDIUM	MEDIUM	LOW – MEDIUM
Written Communications (e-mail & letters)	LOW	LOW	HIGH

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Confidentiality

Do not forget about CONFIDENTIALITY

- Your project concept has a high potential value so be sure not to give that away for free to a possible rival
- Your project summary should not contain any confidential information!
- Prepare and sign a Non-Disclosure Agreement prior to releasing additional information

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Typical partner recruitment process

Step 1
Identify Project Partnering Needs Based on Capability Gaps

Step 2
Identify Potential Partners with the Required Capabilities

Step 3
Prepare Materials to Support the Partner Recruitment Campaign

Step 4
Engage with Each Partner to Discuss their Interests and Suitability

CONFIDENTIALITY AGREEMENT

Step 5
Exchange of Information and Agreement of Partner Role and Benefits

Step 6
Written Confirmation of Partner's Commitment to Participate

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Final Recruitment Tips

- Always keep your project budget in mind… don't be afraid to define a funding ceiling for each partner
- Speak (visit) to all partners… especially those you have not directly recruited
- Be very specific with regards to what you want each partner to do and provide (state clearly how this should be presented)
- Contact large companies early as they have time consuming decision making processes
- Large end-user companies are excellent incentives for the recruitment of other partners
- Keep your options open and contact lots of organisations (don't just rely on one or two organisations)
- Don't be afraid to say no and always keep the projects' interests first
- **Allow plenty of time for partnering!**

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What is Intellectual Property?

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What is Intellectual Property (IP)?

Product of the brain

- Cannot be protected as such –
  - it must first be reduced to a
  - physical entity e.g. written down
- Must be original i.e. novel and not copied
- Has no legal meaning or status until it is recorded and, where necessary, registered
- Otherwise it is just like normal property – cars, land etc.

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IP is like Land

- **Owned** – with an intrinsic value determined by the market
- **Worked** – as a farm would be worked or offices used
- **Bought and sold** – including at auction
- **Licensed** – hired out to, or rented from, someone else
- **Mortgaged** – uncommon outside of the USA
- **Left as an inheritance**
- **Abandoned** – e.g. by ceasing to pay maintenance fees
- **Destroyed** – e.g. by publication before patent protection
- **Given away**
- **Unused**

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What are IP Rights?

- When you create something **novel (original i.e. not copied)**, that something is almost always capable of attracting **rights of ownership**
- In some cases these rights are **automatic** e.g. copyright in texts, pictures, databases, software, etc. but they may need to be **asserted and registered** for maximum protection
- In some cases, they are **not automatic** e.g. you can apply for a patent to protect a novel technology and you have the option of registering trademarks, designs and breeds of plants – **non-automatic rights must be bought**

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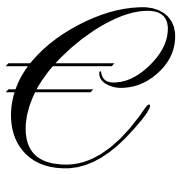
Why are IP Rights Important?

Primarily people hold IPRs because they can provide the owner with a **market monopoly** e.g. patents can protect technologies for up to 20 years

IPRs have an **intrinsic value** depending on how strong they are and how the market perceives the usefulness of the products or processes they protect

IPRs can therefore **add value**
to an enterprise's **bottom line**
and
can be e.g. **sold or licensed**
to **realise revenue** from the underlying IP



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Other reasons for protecting IP

- Your ideas are protected from **illegal copying** (infringement of your IPRs) in all the jurisdictions where they are registered/asserted
- They are essential if you need to raise any **Venture Capital**
- IPR ownership allows you to issue **licences** in return for **royalties** and/or **lump sums**
- BUT! It might not be the best route for an SME
  - can you afford to maintain your IP?
  - can you afford to take infringers with big bank accounts to court?

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IPR Overview

Patents	Utility Models	Trade Marks	Industrial Designs	Copyright
Technical inventions	Technical inventions	Marks for products, services	Designs	Creative works
• New • Inventive step • Industrial application	• New • Inventive step • Industrial application [Protectable subject matter can be restricted]	2D or 3D pictures, words, names , colours or sounds	Shape	Design documents, software, databases, semiconductor designs
20 years	+/- 10 years – variable across Europe	10 years – indefinitely renewable	5 years – renewable up to 25 years	Author's lifetime + 70 years
• National Patents • European patent application • PCT applications	National utility models (not available in all EU)	• National TM office • Community TM (OHIM) • International registration	National industrial designs (not available in all EU)	
• National patent offices • EPO • WIPO	National patent offices	• National TM offices • WIPO • OHIM	• National offices • WIPO • OHIM	• Automatic • No registration • Societies can be joined

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Key IPR issues in collaborative R&D

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Key IP Definitions

- **Background IP –** What each Partner has created and owns prior to the Project or has developed at their own cost during the course of the Project
- **Foreground IP –** Results of the Project created after its start date
- **Access Rights –** Licences issued/granted between the partners for use of both the BGIP and the FGIP during the Project and for the exploitation of the FGIP after the project has finished

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Key IPR Issues

- Management of the IP during and after the project
- Determination of Access Rights for the specific BGIP and FGIP in your project
- Determination of inventors and ownership of new IP generated in the project
- Drafting of patent applications – who pays?
- Maintenance of IPRs e.g. paying patent application fees

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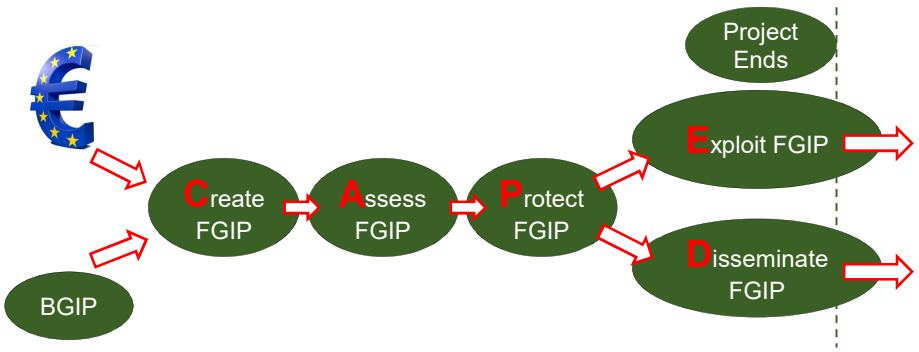
IP Lifecycle



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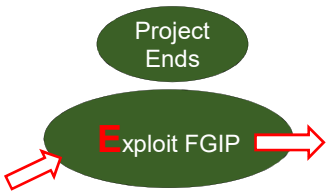
Exploiting IP

There are many routes to exploitation of FGIP

- Form a **Joint Venture** with the project partners
- Manufacture products or deliver a service yourself
- **Licence** the FGIP to third parties
- Create a **franchise operation**
- Sell or give the FGIP to a third party (other project partners permitting, of course!)
- Enter **new markets**, expand existing markets, **export products and services** for the first time



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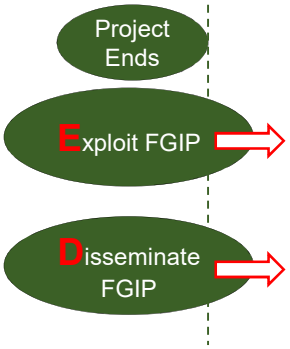
Disseminating IP

Once the FGIP is protected, **tell the world!**

- Trade fairs and exhibitions
- Conferences, seminars and workshops
- Trade magazines
- Project website and magazine
- Copyright articles in newspapers
- TV and radio appearances

Or

- **Just keep it secret!**



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What Brussels Expects:

IP IS created
IP IS Protected
IP IS Used

- Ownership to be agreed and specified – Inventing party is owner is typical model
- Shared ownership is possible
- Management of IP is clearly explained – Who is responsible/What steps will be taken
- Keep an IP register of Background and Foreground created
- Seek appropriate protection

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Budget development & management

Project Financial Management
Financial Issues
Record Keeping
Cost Reporting
Payment Procedures

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Eligible Costs

(i) they must be **actually incurred** by the beneficiary

(ii) they must be incurred **in the period set out** in the DOA, with the exception of costs relating to the submission of the periodic report for the last reporting period and the final report

(iii) they must be indicated in the **estimated budget**

(iv) they must be incurred in connection with the action as described in the DOA and **necessary** for its implementation

(v) they must be **identifiable and verifiable**, in particular **recorded in the beneficiary's accounts** in accordance with the accounting standards applicable in the country where the beneficiary is established and with the **beneficiary's usual cost accounting practices**

(vi) they **must comply with** the applicable national law on taxes, labour and social security

(vii) they must be **reasonable, justified** and must comply with the principle of **sound financial management**, in particular regarding economy and efficiency

FROM GRANT AGREEMENT: ARTICLE 6 — ELIGIBLE & INELIGIBLE COSTS

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Eligible Costs

Overarching Principles – Translated!!

- Costs actually incurred during pursuit of activities agreed in the Description of the Action
  - Labour/Personnel
  - Travel and Subsistence
  - Consumables
  - Equipment
  - Other Direct Costs
  - Subcontract
  - Indirect Costs (25%)

Eligible Costs

Financial Audit Requirements

Only required if funding per partner exceeds **325,000 €**

- Calculation of the threshold value only on the basis of actual costs and average personnel costs
- Certificate on the Financial Statement (CFS) to be submitted only once (together with the final reporting)
- Only qualified auditors may issue a certificate
  - For public bodies, the certificate may be issued by an independent public officer with formal competence to audit the beneficiary

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Ineligible Costs

(i) costs related to return on capital;
(ii) debt and debt service charges;
(iii) provisions for future losses or debts;
(iv) interest owed;
(v) doubtful debts;
(vi) currency exchange losses;
(vii) bank costs charged by the beneficiary's bank for transfers from the *[Commission][Agency];*
(viii) excessive or reckless expenditure;
(ix) deductible VAT;
(x) costs incurred during suspension of the implementation of the action
(xi) costs declared under another EU programme

From Grant Agreement

Bottom-up Costing

- This method looks at the individual components that will make up the cost of the project and adds them together
- Partners develop their own cost estimates based on their understanding of what they will be doing on the project
- This is a much more detailed and accurate way to estimate the cost of a project

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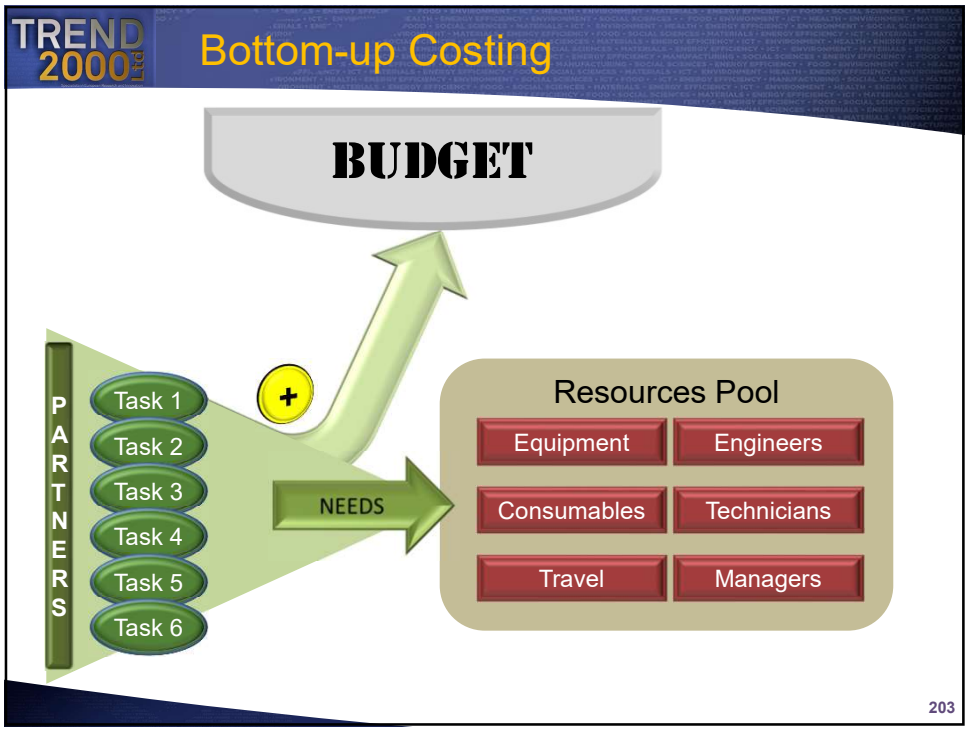

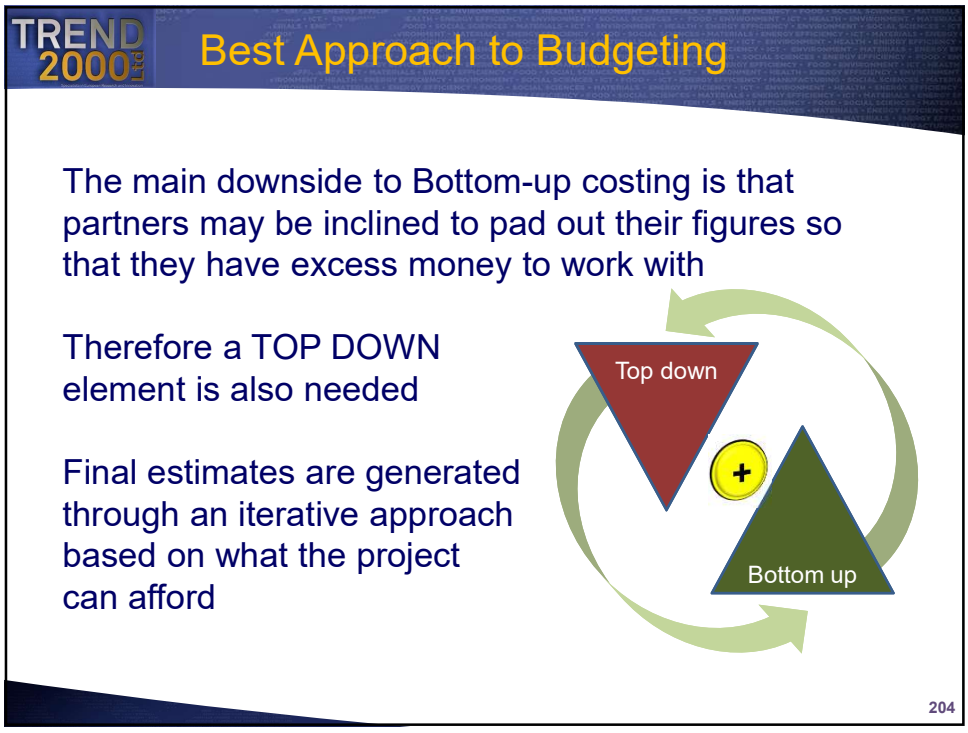

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Financial Information – Key Facts

- LEs have the SAME funding levels as SME partners
- All activities have same funding levels within a project BUT there are TWO distinct types of project
  - RIA – 100% (TRLs 1-6)
  - IA – 70%
    - Demonstration (TRLs 6-8)
    - Market Replication/First Application (TRL 7-9)
- BUT - Not for Profit organisations funded at 100% for IA
- Overheads are FIXED for ALL at 25%
- Non-deductible VAT is an eligible project cost
- Only Partners claiming €325k grant or more need an audit certificate - Just 1 at the end of the project

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Personnel Costs

Cost to the employer for staff working on the project

- Staff grade
- Actual salary for that grade
- Taxes paid
- Pension contributions
- Other

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Personnel Costs

Calculating salary costs per annum:

Staff Grade A: Professor
Gross Salary: €85,000.00
Employment taxes (13%) = €11,050.00
Pension Contribution of Employer (5%) = €4,250.00

Total salary cost per annum = €100,300.00

PERSON MONTH COST (€100,300.00/12) = **€8,358**

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Personnel Costs

Calculating average personnel cost per month:

Staff grade A: Professor - **€8,358**
Time on project - 6 person months = €50,148
Staff grade B: Post Doc - **€7,100**
Time on project - 24 person months = €170,400
Staff grade C: PhD - **€6,150**
Time on project - 24 person months = €147,600

Total cost = €368,148 for 54 person months

Average cost per person month = $\frac{368,148}{54}$ = **€6,818**

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Personnel Costs

Calculating average labour cost per month:

Do not forget potential salary raises!!!

Assuming an increase of 2.5% per annum on a 3 yr project gives:

Year 1	Year 2	Year 3	**Ave**
€6,818	€6,988	€7,163	**€7,000**

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Travel and Subsistence

For a typical project meeting:

- No of meeting days – 1, arrive the night before, leave the evening after
- One return plane fare
- One night at hotel
- One days subsistence

Gives: €500 Flight – (Estimated flat rate)
€100 Hotel – (1 x €100)
€100 Subsistence (1 x €100)

Total = €700 per meeting

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Travel and Subsistence

Per Partner build up as follows:

Partner 1: 10 Management Meetings – Gives T&S of €7,000
15 RTD Meetings – Gives T&S of €10,500

Partner 2: 5 Management Meetings - Gives T&S of €3,500
20 RTD Meetings - Gives T&S of €14,000

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Consumables

Per Partner build up as follows:

Estimate the consumables required per WP/Task

Typical consumables:

- Materials
- Equipment specifically for the project that can not be used elsewhere (Eg; strain gauges, prototype tooling etc)
- Computer software licenses

Make sure these are not covered under your normal 'Indirect Costs'

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Equipment

Per Partner build up as follows:

Estimate the Equipment required per WP/Task

- New Purchases – To be amortised over the project duration
- Existing Equipment - Can also be claimed if not already written off in the accounting system

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Equipment

Capital Equipment – Amortised over 10 years

- Bought at beginning of 2nd year of a 4 year project
- Used 50% of the time for project work alone for the remainder of the project
- Equipment Cost - €250,000

Allowable project cost is – 3 years at 50% of the time used on the project

Therefore 3 years amortised cost – €75,000 at 50% usage = €37,500

NOTE: You will need to keep a log of equipment usage for audit

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Overheads – Indirect Costs

Basic Rule for H2020 Projects:

Flat Rate – 25%

These apply to **all** direct costs

except Subcontract and Third Party costs

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Subcontracting

Basic Rule for H2020 Projects

Should not be for project critical activities

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Key Information from Partners

- Average Person Month Cost – For staff typically working on project
- Estimate of person months per task
- Estimate of consumables per task
- Estimate of travel days with overnight stays
- Equipment to be used/purchased
- Subcontracting

Key TIP – Create a template for partners to fill in to provide this information

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H2020 - Project Budget Form

	Estimated Eligible Costs (per budget category)					EU Contribution	
	A. Direct personnel costs	B. Direct costs of subcontracting	D. Other direct costs	E. Indirect costs	Total Costs	Reimbursement rate %	Maximum EU contribution ***
Form of costs ****	Actual	Actual	Actual	Flat rate 3 25%			
	(a)	(d)	(f)	(g)	(i)	(j)	(k)
Total beneficiary 1							
Total beneficiary 2							
Total beneficiary 3							
Total consortium							

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Financial Arrangements

The coordinator and partners may agree to distribute the pre-financing in stages to further minimise financial risk to the project

The Consortium Agreement MUST address this aspect

The Reporting intervals have been getting longer 18 months is more typical and the pre-financing may vary. It will be specified in the Grant Agreement.

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Project Cost - Records

- Timecards for **ALL** staff working on the project
  - Timecards should also include which project task being worked on
  - Day books also VERY useful and to be encouraged for researchers
- Details of salaries for all staff and records of these being paid
- Full details of any expenses with all receipts and person travelling
  - Visit reports for all visits where expenses are claimed
- Full details of all Other Direct Costs and why they are needed with receipts
- Full details of all Capital Equipment and cost basis for inclusion

Ensure your partners also keep these

You must maintain an AUDIT TRAIL

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Demonstration

Excel type Spreadsheets are the ONLY way to go!

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Agenda – Module 3

Module 3 – Key Aspects of Successful Coordination

14:30 The role of the coordinator and personal skills needed
Project management toolkit
Building appropriate consortia

16:00 Coffee Break

16:20 Introduction to IP
Budget considerations for the consortium

17:35 Questions and discussion

18:00 End of day 1

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Agenda – Module 3

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