5. Secrets to success with project proposals

There is a YouTube video of part of this course at:
http://www.youtube.com/watch?v=3jSQU-_tDA4

I have prepared a detailed guide for writing project proposals based on this presentation (updated September 2013), and illustrated below. Let me know if you want a copy.

Secrets to success with project proposals

Steve A Quarrie
Guest Professor Faculty of Biology, Belgrade University, Serbia
Visiting Professor Newcastle University Business School, UK
Head of Education and Training, Balkan Security Network, Belgrade

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Preface

This guide is a development of a document “Secrets to success with FP7 REGPOT proposals”, written whilst working for the Serbian former Ministry of Science and Technological Development as the Director, Consultative Bureau for International Projects from 2008 to 2011. It was put together specifically to help Serbian scientists improve the quality of their proposals for the FP7 REGPOT scheme, which at that time was the most popular sub-programme of FP7 for Serbian scientists.

This original document has now been modified to make it more general in its approach and philosophy for writing project proposals, though many of the examples come from the FP7 REGPOT sub-programme. The advice is based on experiences of reading proposal drafts written by Serbian scientists, discussions with them and evaluation summary reports (ESRs) for their submitted proposals.

The approach of this document is to focus largely on the philosophy needed for success rather than just advice on how to fill in the application forms. It aims to help put the applicants within the minds of the proposal reviewers and the funding programme managers to ensure that what is written is what they want to read and not what the applicant wants to write!

This guide accompanies the Balkan Security Network (www.balkansecurity.net) European Project Proposal (EPP) training course PowerPoint™ presentation ‘Excellence in EU Project Proposal Writing’, also available as a YouTube video at www.youtube.com/watch?v=3jSQU-_tDA4. I hope you find the “Secrets to success …” useful.

Steve Quarrie
steve.quarrie@bio.bg.ac.rs
Belgrade
September 2013
Getting started - your project ‘Road map’
Here is a suggested ‘Road map’ for you to get experience in preparing project proposals for your organisation which will lead to H2020 projects:

You aim to master the philosophy needed for success.

Eventually write your own EU “H2020” project proposal.

Become a Work Package leader in a H2020 project.

Be invited as a partner in someone else’s H2020 project.

Write a proposal for funding from a major national funder.

Write a proposal for a small bilateral international project.

Write a proposal for local funds for a small project.

Develop your network of potential project partners.

Wherever you are on the ‘Road map’ you need to:

- Focus on networking - you get to know people,
- Focus on networking so people get to know you!
- Focus on being invited to be a partner
- Develop your international profile
- Get to know research scientists locally
- Practice proposal writing skills:
  - small scale (local funds or bilateral),
  - international funds (e.g. COST project)
  - ...
  - finally H2020 (the most challenging of all)

This will take you several years!!

Researchers - you should raise your profiles by:

- Publishing research in high impact journals,
- Presenting research at international conferences
- Adding your research output to ResearchGate
- Adding your research output to ImpactStory (https://impactstory.org), etc
- Setting up a (public) Google Scholar account to advertise your citations and h-index
- Trying to take part in relevant COST Actions
- And being pro-active in contacting other leading research groups directly.

This will also take you several years!!
Use ResearchGate, ImpactStory, Academia.edu etc to advertise yourself.
Use Google Scholar to demonstrate your impact.

Proposal preparation from start to finish

How long do you think it takes to put together a collaborative international project proposal (e.g. H2020) and submit it?

For a H2020 proposal I helped put together with a colleague at Newcastle University, the timeline was as follows:

- Call text published: Dec 2013
- Decided to go ahead with a call topic: Feb 2014
- Stage 1 proposal (15 pages) completed: Jan 2015
- Stage 1 proposal successful: Mar 2015
- Stage 2 proposal completed: Jun 2015
- Stage 2 proposal results announced: Nov 2015
- **Success, we got the proposal funded: €7 million**!
- Likely project start date: Mar 2016

Topic success rate was 8%: 1 out of 12 submitted.

<table>
<thead>
<tr>
<th>Start with an idea.</th>
<th>Start with a funding source.</th>
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<tbody>
<tr>
<td>Find a funding source for it.</td>
<td>Fit an idea to it.</td>
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</table>

Find out what background documents you will need.

Read all the background documents.

Identify all the project stakeholders and expected impact.

Put together your project team or consortium.

Establish needs and outcomes for your project (concept).

Meet, discuss and argue over ideas, roles and budget.

Define the activities to achieve the outcomes.

Start working on the budget and refine the details later.

Start writing the text in plenty of time. **75% of the time**

Find the evidence to support all your statements.

Prepare all supporting documents that are needed.

Make sure you submit everything **before** the deadline!

**Putting documents together**

Create a proposal folder into which you put:

- Relevant funding source documents
- Relevant policy documents
- Background documents for the science
- Relevant previous research publications
- Guidelines for applicants
- Evaluation criteria
- Your proposal texts (each dated)
- Supporting documents (letters of approval, confidentiality agreements ...)

Proposal writing LOVCEN, 10 December 2015
Proposal writing LOVCEN, 10 December 2015

Time line in weeks

0 1 2

Idea!! Identify a funding source and suitable topic (read lots of background documents)

Adjust the idea to fit the topic better

This circle is your research expertise

a suitable topic

This first step can often last many months, while looking for suitable funding!

Identify potential partners

Contact potential partners (emails, telephone, Skype, ...)

a suitable topic

Adjust the idea and partner contributions to maximise the topic needs (lots of meetings, phone calls, ...)

Contact SMEs, .... to improve the mix/distribution of partners (emails, etc)
### Time line in weeks (conservative estimate!)

<table>
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<tr>
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<th>9</th>
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</table>

**Adjust the idea to include the new partner**

Meanwhile, start writing as time is getting on!

Keep reading instructions for each section

**Adjust the idea to fit the instructions better**

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### Time line in weeks (conservative estimate!)

<table>
<thead>
<tr>
<th>0</th>
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<th>12</th>
<th>13</th>
</tr>
</thead>
</table>

Read again the *impact expected*

**Adjust the work to maximise the expected impact**

---

Complete the first budget draft - too expensive!

**Adjust the idea** to fit the budget requirements - that's a *problem!!*

Check for consistency of information provided

**Adjust the idea** to remove inconsistencies

Attempt to upload documents into the web site; adjust file size if too large!

Final check of instructions, formatting and spelling check

**Upload the final document** and click "Submit".
This is your starting point for identifying what to do for your project, using Horizon 2020 as an example.

**Finding the right topic in Horizon 2020:**

![Horizon 2020 image]

I started by highlighting the key words and phrases in the topic description, as shown on the next pages.

This example is for the proposal that has just been funded for H2020 (stage 2 submitted in June this year).

I started by highlighting the key words and phrases in the topic description, as shown on the next pages.....

This was the basis for identifying what the Commission wanted the project to achieve (through activities).

The topic description is given on the next page...
H2020-SFS-2015-2: Sustainable food chains through public policies: the cases of the EU quality policy and of public sector food procurement

Specific challenge: In 2012 a new Regulation on the quality schemes for agricultural products and foodstuffs was adopted in the EU. Important pillars of the EU quality policy are the ‘protected designation of origin’ (PDO)/’protected geographical indication’ (PGI)/’traditional specialty guaranteed’ (TSG) schemes, a scheme for optional quality terms and organic food and farming. They are meant to maintain a large variety of agricultural products, reflecting the diversity of EU agriculture and to allow remunerative prices to producers. The policy is expected to play an important role especially in disadvantaged and remote territories where agriculture is a prominent economic activity. On the other hand, the European public sector is emerging as a powerful actor in the food chain notably through public procurement policies which can create new markets and foster the development of an ‘economy of quality’. Innovative approaches in this area are multiplying in various parts of Europe from different types of governance (communal, regional, etc.). These approaches cater for different objectives such as improving the nutritional balance of school canteens, contributing to education on food or fostering the procurement from local producers. Hence they have the potential to deliver economic, environmental and social benefits (including health) to the society.

Scope: Proposals should investigate the impact of both the quality policy and public sector food procurement policies (including “school schemes”) on the overall sustainability of rural territories and their role in fostering the provision of public goods as well as the impact of public food procurement on balanced nutrition. They should extend to short food supply chains which are impacted by both types of policies and assess their impact on the rural economy. Proposals should investigate the contribution and impact of the quality policy to the various objectives of the agricultural and rural development policies ranging from social and territorial cohesion to consumer confidence. Costs related to the policy and possible routes to improve its delivery should be researched. Proposals should cover a large array of PDOs and PGIs, organic products (including agriculture and aquaculture products), and short food supply chains based on regional sourcing. On food procurement policies, proposals should review existing practices, identify constraints to their development, investigate how communities of practice and partnerships involving a broad range of stakeholders can be utilised and shed light on its impact on territorial development. A large review of existing schemes should allow elaborating good practices, decision tools and recommendations for scaling up. Relevant data on short food supply chains should be gathered, which should allow the assessment of their contribution to the agricultural and rural economy. Relevant knowledge platforms should be set up. Research should involve relevant categories of stakeholders and cover an appropriate number of EU Member States, Associated Countries and Third countries. Proposals should fall under the concept of ‘multi-actor approach’.

This action allows for the provision of financial support to third parties in line with conditions set out in Part K of the General Annexes.

The Commission considers that proposals requesting a contribution from the EU in the range of EUR 7 million would allow this specific challenge to be addressed appropriately. Nonetheless, this does not preclude submission and selection of proposals requesting other amounts.

Expected impact:

• provide insight into the effects of the EU quality policy and public sector food procurement policies on sustainability and on the promotion of a healthy diet
• allow to better design and implement these policies and to foster their delivery to the overall sustainability of agriculture and the rural economy
• clarify how these approaches, through the creation of new quality markets, can foster the development of local food chains.

Type of action: Research and innovation actions

The key words and phrases giving us information on what to do for the project were highlighted, as shown on the next page ....
Phrases highlighted in green identified the work (activities) to be done as well as the type of expertise needed in the consortium.
Reading this text phrase by phrase led to us identifying the activities needed.

These were written on a white board and then grouped into related activities.

This gave us the basic research, and demonstration WPs: WP2-WP9.

WP1 would be Management.
WP8 would be Dissemination.

Details of how the highlighted words and phrases were converted into the project’s Work Packages are given on the next page ....
Scope: Proposals should investigate the impact of both the quality policy and public sector food procurement policies (including “school schemes”) on the overall sustainability of rural territories and their role in fostering the provision of public goods as well as the impact of public food procurement on balanced nutrition. They should extend to short food supply chains which are impacted by both types of policies and assess their impact on the rural economy. Proposals should investigate the contribution and impact of the quality policy to the various objectives of the agricultural and rural development policies, ranging from social and territorial cohesion to consumer confidence. Both related to the policy and possible routes to improve its delivery should be researched. Proposals should cover a range array of PDOs and PGIs, other products (including agriculture and aquaculture products), and short food supply chains based on regional sourcing. On food procurement policies, proposals should review existing practices, identify constraints to their development, investigate how communities of practice and partnerships involving a broad range of stakeholders can be utilised and shed light on its impact on territorial development. A high review of existing schemes should allow elaborating good practices, decision tools and recommendations for scaling up. Relevant data on short food supply chains should be gathered which should allow the assessment of their contribution to the agricultural and rural economy. Relevant knowledge platforms should be set up. Research should involve relevant categories of stakeholders and cover an appropriate number of EU Member States, Associated Countries, and Third countries. Proposals should fall under the concept of multi-actor approach. This action allows for the provision of financial support to third parties in line with conditions set out in Part K of the General Annexes.

Expected impact:
* provide insight into the effects of the EU quality policy and public sector food procurement policies on sustainability and on the promotion of a healthy diet
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* clarify how these approaches, through the creation of new quality markets, can foster the development of local food chains.

Putting together a project consortium

We started identifying potential consortium partners as soon as the topic had been published.

We focused on the research to be done and who we knew around Europe that could do it.

We then had our core of research partners, though we still had several other (mainly non-research) partners to identify. That lasted a few months.

For these we used mainly “friends of friends” - ask research partners for potential non-research partners.

Let’s say I am looking for a local authority partner in Croatia for a project on energy. First I ask my core researchers already in the consortium if anyone knows a good quality potential local authority partner.

**Good quality** non-research partner means:

1. A reliable contact who is known to be competent
2. Partner in previous internationally-funded projects
3. Quick to reply to e-mails!!
Illustration of non-researcher partners from the H2020 Strength2Food project:

### Dedicated Communication and Training Partners

<table>
<thead>
<tr>
<th>No.</th>
<th>Partner Name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>European Food Information Council (EUFIC) - Communication and impact</td>
<td>Belgium</td>
</tr>
<tr>
<td>17</td>
<td>Balkan Security Network (BSN) - Training, sustainability and research</td>
<td>Serbia</td>
</tr>
<tr>
<td>18</td>
<td>Top Class (TOPCL) - MOOC provider SME</td>
<td>Serbia</td>
</tr>
</tbody>
</table>

### Stakeholder Partners

<table>
<thead>
<tr>
<th>No.</th>
<th>Partner Name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>Confederazione Nazionale Coldiretti (CNC) – Confederation of Farmers</td>
<td>Italy</td>
</tr>
<tr>
<td>20</td>
<td>ECO-SENSUS Research and Communication Nonprofit Ltd. (ECO-SEN) - Local food quality label and food research SME</td>
<td>Hungary</td>
</tr>
<tr>
<td>21</td>
<td>Glowny Inspektorat Jakosci Handlowej Art ykulow Rolno-Spozywczych (IJHAR) - Inspectorate for EU quality schemes</td>
<td>Poland</td>
</tr>
<tr>
<td>22</td>
<td>Food Nation (FOODNAT) - social enterprise SME</td>
<td>UK</td>
</tr>
<tr>
<td>23</td>
<td>Consiglio per la R icerca e la sperimentazione in Agri coltura (CRA-INEA) - Council for Agricultural Research and Economics</td>
<td>Italy</td>
</tr>
<tr>
<td>24</td>
<td>Academia Barilla (BARILLA) - Nutrition and education</td>
<td>Italy</td>
</tr>
<tr>
<td>25</td>
<td>Ministry of Education, Science and Technological Development of the Republic of Serbia (MPN) - Ministry</td>
<td>Serbia</td>
</tr>
<tr>
<td>26</td>
<td>Konzum (KONZUM) - International grocery retailer</td>
<td>International</td>
</tr>
<tr>
<td>27</td>
<td>Municipality of Arilje (ARILJE) - Local authority</td>
<td>Serbia</td>
</tr>
<tr>
<td>28</td>
<td>Consorzio del Parmigiano Reggiano (CPR) – PDO Producer organisation</td>
<td>Italy</td>
</tr>
<tr>
<td>29</td>
<td>Ecozept (ECOZEPT) - Organic and food supply chain expertise SME</td>
<td>Germany</td>
</tr>
<tr>
<td>30</td>
<td>Impact Measurement Ltd (IMPMENT) - Impact of public sector procurement strategies expertise SME</td>
<td>UK</td>
</tr>
</tbody>
</table>
Project impact and sustainability

Policy implementation

Funding programmes

Policy makers

Impact

It is particularly important for research projects that you provide the Expected \textit{impact} for the chosen topic.

Thinking of \textit{impact} in terms of the histograms described previously, consider the following scenario:

This is where you say you will get to.

But this is where the evidence you give says you will get to!

What you write in the proposal must convince the reviewer that you will achieve your goal.
Objective
The objective of this project is to improve the media skills of our junior researchers.

Activities
We plan to have two-week training courses in media skills for all our junior research staff.

Impact
1. We expect this project will have a major impact on improving the media skills of our junior research staff.
2. We are certain that this project will have a significant impact on improving media skills of our junior researchers.
3. We are convinced that this project will have significant impact on improving the media skills of all our junior research staff and to be sustainable into the future.

Which proposal will you give the money to?
It is how convinced the evaluators are that matters!
Regarding impact, most Western Balkan Country projects look like this:

1. They start from somewhere here:
2. They finish ("successfully") after a few years somewhere here:
3. Several years later they are back somewhere here.

Your proposals will have a clearly-defined starting point:
Clearly-defined activities will define the impact at the end:
But there’s something more!!!
You also have to ensure long-term impact after the end:

So, whatever the scale of your project, you must convince the funders that it will have sustainability.
If it won’t have long-term impact, then it won’t have any long-term impact!
If it won’t have sustainability, then why should they give you the money?!
Therefore, you must give convincing evidence that when the money stops, the benefit (impact) of the project will continue into the future.
Scientific excellence:
The excellence of your science will depend on the type of research you plan to do (its *innovativeness*) as well as how you will do it (its *quality*), and *how well you describe it*.

You have to ensure sufficient *innovativeness* and *quality* of the research you plan, and you also need to know *how to describe it*.

Here’s a task description from our Strength2Food. Note how little information is given on “How”:

```
<table>
<thead>
<tr>
<th>Background</th>
<th>Why</th>
<th>What</th>
<th>How</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>“A pan-European consumer survey across 7 countries (XXXX) will be conducted with the aim to quantify differences across EU countries, consumer segments and settings with respect to consumers’ knowledge, perception, and valuation of selected EU/national/regional food quality labels and consumers’ perceived barriers to buy products promoted by EU/national/regional quality schemes. Also consumers’ evaluation of additional/modified policy measures (e.g. adjustment of labels or standards behind the labels) to promote the confidence in and consumption of sustainable products will be investigated. In the framework of the WP we empirically test the influence of selected EU/national/regional food quality labels by cognitive, affective and normative processes within an Integrated Choice and Latent Variable (ICLV) model. The ICLV model is an innovative approach which merges structural equation modelling with choice experiments thereby it allows investigating the impact of latent constructs such as cognitive and affective attitudes, trust, social norms on product choice.”</td>
<td></td>
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<td></td>
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</tbody>
</table>
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```
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>“A pan-European consumer survey will be conducted to quantify differences across EU countries, consumer segments and settings with respect to consumers’ knowledge, perception, and valuation of selected EU/national/regional food quality labels and consumers’ perceived barriers to buy products promoted by EU/national/regional quality schemes. Consumer evaluation of additional/modified policy measures (e.g. adjustment of labels, ...) to promote confidence in and consumption of sustainable products will also be investigated. The survey will be conducted in 7 countries: France, Germany, Hungary, Italy, Norway, Serbia and UK, with n = 600 per country. To ensure representative and comprehensive samples, data collection will be subcontracted to a major international market research company. The same survey will test empirically the influence of selected EU/national/regional food quality labels by cognitive, affective and normative processes within an Integrated Choice and Latent Variable (ICLV) model. The ICLV model is an innovative approach merging structural equation modelling with choice experiments, ... This will transcend previous consumer research on FQS which relies on recognition analysis (London Economics, 2008), ....”</td>
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```
The final version of the task description (at the bottom of the previous page, would have more impact as it gives more details of the work.

Project impact and sustainability (continued)

**Impact** will be determined by answers in your proposal to the following questions:

1. Will we do what we are expected to do for the topic?
2. Will we do the project work sufficiently well to meet the excellent science criterion?
3. Will we disseminate the right project information and outputs?
4. Will we disseminate our project information/outputs to the right people (groups of stakeholders)?
5. Will we demonstrate that our findings and recommendations can be implemented by our stakeholders?
6. Will our various stakeholder groups change their future actions because of our project?

<table>
<thead>
<tr>
<th>Remember that your project objectives (defining how tall the right-hand bar in the histogram will be) <strong>must</strong> also satisfy the objectives of the funding organisation. These are frequently described by the funding organisation as “<strong>Expected project impact</strong>”. So, it is essential that your project objectives also achieve the “<strong>Expected impact</strong>” needed for projects. Do you remember this slide describing <strong>Expected impacts</strong>?</th>
</tr>
</thead>
<tbody>
<tr>
<td>✑ Better integration of the selected research entities in the European Research Area as a whole (long lasting partnership, with research groups elsewhere in Europe);</td>
</tr>
<tr>
<td>✑ Improvement of participation of the applicant entity in EU FP7 projects.</td>
</tr>
<tr>
<td>✑ Improved research capacity for increased contribution to regional economic and social development. Ignore any of these impacts and you don’t get petica!</td>
</tr>
</tbody>
</table>

**Project Objectives:**

Specific objectives need to be **realistic** with **outcomes measurable:**

- to identify polluters and complete a database of defined pollution sources in the Pirot region
- to identify the mechanism(s) used by maize to survive drought in the Banat region
- to analyse GMO contamination in foods using .... [improved] DNA methods or more reliable/efficient/modern technologies

Strategic (long-term) objectives can be relatively **open-ended and non-quantifiable:**

- to improve the efficiency of .... [disease] diagnosis and treatment
- to improve our understanding of .... [some aspect of] ecology (not ideal!!)
- to contribute to the ERA more effectively by improving my/our expertise in molecular biology …
Many scientists confuse objectives with activities. For example, this was written by a senior professor in Serbia for a training visit proposal to increase skills:

“Objective 1: To send 3 young researchers for training courses in state-of-the-art molecular biology techniques.”

This is not an objective but an activity. Ask yourself the question “Why do we need to train young researchers in molecular biology techniques?” The answer (improving their skills, etc) gives you the objective. Thus Objective 1 becomes, for example:

“Objective 1: To improve the expertise of young researchers and give them skills in new molecular biology techniques.”

Your objectives should give the evaluator a clear picture of what the project will achieve. Your objectives should provide the framework upon which you build your project plan (activities).

Your objectives tell the evaluators how much taller you expect the right-hand histogram bar to be in comparison with the left-hand bar!

How you get there is defined by your subsequent description of the project activities. Remember to be consistent in what you write.

So, if you say you plan to achieve something in a project concept note, make sure you describe how in your description of activities, then describe the consequences of this in the section on impact.

Include a “vision statement” in your proposal. This should summarise where you see your research/skills/career at the end of the project.

This is an opportunity to impress the evaluators that you, your research group and your institution are:

- forward-looking
- dynamic
- the best (at least in Serbia)
- doing cutting-edge research
- doing strategic planning for the future
- an essential player in future EU research
- bla, bla, bla, itd!

By the end of the Background/Concept of the project, the evaluator of your proposal should be thinking:

‘This looks an interesting subject.’
‘This person knows about the subject.’
‘This person knows what is going on elsewhere.’
‘It looks like this research/training/etc needs to be done and the researcher is suitable to do it.’

This leads to your description of the work (activities) to be done.
Excellence in project proposal writing

A successful proposal, especially one for H2020, has to overcome many challenges to get the money.

Writing a successful proposal needs the right philosophy to overcome those challenges.

The philosophy is the same for every proposal!

So, you aim to master the philosophy for success.

The philosophy is the same for every proposal (applicable to all projects).

It is independent of the subject or topic.

It is independent of the funding source.

It is independent of the programme within the funding source.

This difference between most people’s concept of a project proposal and an externally-funded project proposal is illustrated pictorially below:

The philosophy is to know how to be competitive.

Commission press release (Jun 2014): “SME instrument celebrates first great success after first cut-off date”

Great success for the Commission means great failure for you: only 6% success. [Latest results only 6.3%.]

For a H2020 proposal BSN was a partner in (submitted in May, 2015) the success rate was even lower!

H2020-INT-SOCIETY-2015: Europe as a global actor

- INT-10-2015 - The European Union and integration challenges in the Balkans (RIA): 26 (1/26 = 3.8%)

EU-funded proposals are very competitive: 87% failure!

Your philosophy is to make your proposal the best.

To compete means beating the rest by making your proposal the best - up at the top of the list.

Only if you convince the funding source that your proposal is the best will they give you the money!

They will often fund only up to one proposal per topic.

So, coming second will get you no silver medal!!
So, how do you make your proposal the best? The answer is illustrated schematically with these 2 figures. These two figures illustrate the secret to success!

This is typical of how funding programmes work:

European Commission

Your project

EU Funding programmes

Beneficiaries

EU politicians

European impact

Impact

Their impact

So, your project needs to have significant impact. So, you need to know how to convert this: The format for a proposal that will fail - Vertical axis indicates progress, which determines final impact:

- Poor definition of the starting point (poor needs analysis).
- Poor definition of how to get to the finishing point (description of activities).
- Poor definition of the finishing point (poor impact analysis).

Proposal writing LOVCEN, 10 December 2015
Your proposal has got to be the one that gives the best definition of:
• where you start from
• where you will get to
• how you will get there
i.e. description of activities (the steps up the ladder) with evidence of progress.

Here’s another criterion you need to satisfy:
It also has to give the best value for money!
If two proposals claim the same impact, the cheaper one will get funded!

And another criterion if you plan to write a research project proposal is illustrated below ....
It must also be world class competitive research!

Poor quality science will have a low impact!
Funders will not fund poor quality research! So, you must know that your research is good! Only you can judge this!

How do you get rid of the fog in the bars?

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Project activities</th>
<th>Outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Needs analysis</td>
<td>New resources</td>
<td>Funder's impact</td>
</tr>
<tr>
<td>State-of-the-art</td>
<td>Activities</td>
<td>Stakeholder impact</td>
</tr>
<tr>
<td>Partner justification</td>
<td></td>
<td>Beneficiaries' impact</td>
</tr>
<tr>
<td>Existing excellence</td>
<td></td>
<td>Sustainability</td>
</tr>
<tr>
<td>Existing capacity</td>
<td></td>
<td>Value for money</td>
</tr>
<tr>
<td>Existing resources</td>
<td></td>
<td>Publicity</td>
</tr>
<tr>
<td>Good track record</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Describing clearly all the Inputs defines the height of the first bar. That allows you to define the objectives (because you know where you are starting from).
Then you think about and describe all the Outputs that are needed. The description of the Outputs tells you how much taller your second bar will be than the first.
The difference between the two bars is achieved by doing activities in the project.
Once you have described all the activities needed to reach the second bar, then this is your project proposal!

Once you have found a suitable funding source, what do you do first? ...... You have a “Dragan” moment!
Dragan always started his research by doing a lot of background reading, to identify what was needed as well as all potential risks of things going wrong!
Your “Dragan” moment means to sit down and read! .... And read! .... And read! ....
Whenever I am asked to read someone’s proposal and give advice, the first thing I do is not read the proposal!
I ask for all the supporting documentation and the guidelines for applicants and read those first.
And only then do I read the proposal and compare it with what is required by the funding organisation.
But how do you make it the best (to get the money)?

Four major problems have been evident in proposals I have reviewed for projects in Serbia:

- Irrespective of how intelligent they are, scientists are unable to read and implement instructions! [Not a problem unique to Serbian scientists!]
- Statements are made without any supporting evidence so evaluators are not convinced.
- Insufficient details are given of activities planned to be carried out to convince evaluators of impact.
- The text of different parts of a proposal is not consistent so evaluators get confused..

Not reading and implementing instructions:
The first rule is - keep them happy!
That means - do what they ask!
Ensure you do what they want you to do by reading carefully every word of the background documentation and instructions (every page - however boring it is)!
Read the funding objectives, eligibility criteria, and impact expected for projects as well as evaluation criteria and any Guide for Applicants, and then do exactly what they want you to do!
If it says maximum length 1 page for a particular section, don’t write 2 pages! [Excess pages ignored in Horizon 2020 project proposals!]
The instructions should be so easy to implement.

The large majority of proposal writers don’t do this!
Some funding sources (including H2020) say they will tell evaluators to ignore any pages they receive over the stated limit!
For electronic submissions it is usually impossible to exceed character limits [check if this includes spaces.]

An example of comments I wrote on a H2020 SC proposal in January:
[Most of this section seemed to be written anonymously – we have a consortium of members who will do the project, full stop. I’m more likely to get excited about this if I know who is going to do what, and what makes them so good/appropriate/expert/competent/guaranteed to deliver, etc?]

[Further thoughts – just to reinforce my comments above: Having now read your section 1.3, although you pasted the Guidelines for section 1.3 in yellow highlighting at the beginning, much of the text seemed to ignore the guidelines, and read more like a typical NIH application, where you just provide your own introduction to a research project.]
It will create a much better impression for the Commission and help the evaluators to make sure that you go through each of the guideline bullet points one by one and give the information that is specifically requested.

Although the Guidelines ask you to describe your project’s ‘progress beyond the state-of-the-art’, you haven’t mentioned ‘state-of-the-art’ once in this section. To be able to describe advance beyond the existing state-of-the-art, you need to describe the current state-of-the-art and there’s nothing on this in this section at the moment. You also haven’t mentioned ‘ground-breaking’ in this section. So, what is ground-breaking about your project? What will give it the edge over competing project proposals?

Email sent 8 June 2015:

Hi Steve

I hope this email finds you well. I wanted to share with you the news that we have just heard our H2020 [ACRONYM] proposal that you helped with has been successful. I’m amazed actually. Having done a good FP7 and had that turned down I was not expecting to be successful with this one. In fact I keep thinking they must have sent us the wrong email!

Thanks so much for your help with our proposal. I’ve no doubt it made a huge contribution to our success.

Any news on yours?

Very best

H2020 Research and Innovation Projects - Standard Proposal Template guidelines for:

1.3 Concept and approach

• Describe and explain the **overall concept underpinning** the project. Describe the main ideas, models or assumptions involved. Identify any trans-disciplinary considerations;

• Describe the **positioning of the project** ... in the spectrum from ‘idea to application’, or from ‘lab to market’. Refer to Technology Readiness Levels where relevant;

• Describe any **national or international research and innovation activities** which will be linked with the project, ...;

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

• Where relevant, describe how sex and/or **gender analysis** is taken into account ...
Here is the Expected impact for a project on reducing tobacco-induced diseases for a H2020 Health project:

- To demonstrate the link between the intervention(s) and health outcome in lung diseases; ..... 
- To develop lower cost therapeutic option for smoking cessation that are cost effective in lower ... income countries; 
- To contribute to the United Nations Millennium Development Goals.

Ignore any of these (implicit instructions for) any of these impacts, then you don't get maximum score (5/5)!

No evidence for statements:

Be intelligent in implementing the instructions. Every word of the policy document has a meaning.

Here’s an example from an EU FP7 Work Programme:
“Bla, bla, bla [We want] … close cooperation with at least 3 European outstanding …. partnering organisations”. [Their italics, not mine!]
“outstanding” - so you must provide the evidence!

So do not write “Our three European partners are outstanding” and expect evaluators to believe you!

Therefore, do not assume anything is obvious to the evaluators!
Assume evaluators need to be told everything!
“Many years of successful research”
“We have published many papers in leading journals” …
These are useless statements to make without supporting them with the evidence!
Give sufficient detail to define the histogram bars. Here are two examples....

"One of our young R&D scientists will spend one month in project year 1 at Institute X in Paris to be trained in how to use an ABC machine."

What are your thoughts about this description of work above?

It is a typical example of lack of detail:
The y-axis is not defined.
Where they start from is not defined.
Where they get to is not defined, because how they get there is not defined!
So, make sure you define the y-axis sufficiently.

This example gives more detail to quantify the y-axis:

<table>
<thead>
<tr>
<th>Needs analysis</th>
<th>Activity description</th>
<th>Impact analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Our institute currently has no ABC machine, though we plan to buy one in project Year 1, as it is essential to develop the diagnostic tests of Objective 4. Thus, 1 of our talented scientists will analyse pasta DNA in the institute of Dr X in Paris for 1 month immediately before commissioning our ABC machine. Dr X has used ABC since 2000. She has 2 machines, one of which is regularly used to train visiting workers. Upon return to our institute, the young R&amp;D scientist will help commission the new ABC machine and give training in its use to others to ensure dissemination and sustainability of the newly-acquired expertise.&quot;</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

So, make sure you define the activities sufficiently to give the evidence that objectives will be achieved.
Even if you define the first bar well, without sufficient detail for the activities you still have fog in the second:

**Not sufficient detail (2):**

Even if you define the first bar well, without sufficient detail for the activities you still have fog in the second:

**Not consistent:**

Ensure consistency in what you say throughout your proposal. Thus: If you refer to improving research management skills as a project objective, make sure you describe activities somewhere in the rest of the proposal to achieve this!

Impact: “the state of the art searchable knowledge base using Confluence knowledge management software that WP 3 will produce.”

*This wasn’t mentioned in WP 3 text!*

It is very easy to make mistakes in consistency because you write the text bit by bit, but evaluators read your whole proposal in just a few hours.

**Your project will be a series of activities to achieve your project goals.**

**How much detail is needed to convince evaluators?**

Answer: I don’t know! It will depend on many factors.

Here are some of those factors:

- Your evidence of previous experience
- The importance of the activity to achieve project objectives
- Other supporting information given elsewhere in the form
- The space available on the form (any page limit)
- Whether there is a text character limit or not, etc. ....

**If in doubt, give more details, if space allows.**

Because, if you don’t describe these activities (the steps up the ladder from the first to the second bar) with enough detail, how will evaluators know that:

- you know what to do
- you have identified and planned to overcome problems
- your methods are appropriate, and so on .....  

Adjust the amount of detail you give to describe the work/ tasks to be done according to the project scale and type.
Description of work/Description of activities or tasks:
Adjust the amount of detail you give to describe the work/tasks to be done according to the project scale and type.
A small-scale project for your first proposal (e.g. a staff training visit) would need more description of day-to-day activities than a large international collaborative project by experienced staff.
“We plan two stakeholder conferences to discuss the issues.”
“We plan a 3-day international stakeholder conference in Belgrade in year 1 and another 3-day event in Milan in year 2 …”
“We plan to invite key Ministry representatives and EU experts.”
“We plan to discuss key problems with methods on day 1 and to present potential solutions implemented in EU states on day 2…”
You have to decide which level of detail is appropriate, but you must convince evaluators that objectives will be achieved.

Describing work to be done for a research project:
- it must be realistic
- it must have sufficient detail for the evaluator to judge whether you know what you are doing
  (do not assume the evaluator will accept that you know how to regenerate plants from callus just because other people in the lab have been doing it for the past 20 years!)
Remember that any reviewer from the ‘West’ will be looking for any mistakes in your plan [anything that would prevent you identifying the truth]. They will inevitably be questioning and sceptical because that is the way they have been trained within their own research environments.
However, they will also get pleasure from and acknowledge a good idea when they see it.

Projects to do research have to convince the evaluators that the research will be competitive.
The philosophy for success that I am giving you is not subject-specific, so it is up to you to ensure that your planned research subject is good enough quality.
One of my recent proposals failed because the evaluators did not believe that the science would work. I did not agree but their decision is final:

ESR: “The quality and effectiveness of the scientific methodology and the associated work plan are very good. However, the number of lines used in the QTL analysis and association mapping is considered sub-optimal and will seriously limit the achievement of the project’s goal. The establishment of new screens for root development under different environmental conditions provides an excellent tool.”
Focus on describing *How* you will do the activities. This will determine the *quality* of your research.

Here’s the (poor) example of a H2020 Task description (the first draft):  

```
Background  Why  What  How  Result  “How” is the key word.
“A pan-European consumer survey across 7 countries (XXXX) will be conducted with the aim to quantify differences across EU countries, consumer segments and settings with respect to consumers’ knowledge, perception, and valuation of selected EU/national/regional food quality labels and consumers’ perceived barriers to buy products promoted by EU/national/regional quality schemes. Also consumers’ evaluation of additional/modified policy measures (e.g. adjustment of labels or standards behind the labels) to promote the confidence in and consumption of sustainable products will be investigated. In the framework of the WP we empirically test the influence of selected EU/national/regional food quality labels by cognitive, affective and normative processes within an Integrated Choice and Latent Variable (ICLV) model. The ICLV model is an innovative approach which merges structural equation modelling with choice experiments thereby it allows investigating the impact of latent constructs such as cognitive and affective attitudes, trust, social norms on product choice.”
```

**Closing remarks:**

Remember that for research proposals, the evaluators are likely to recommend only those proposals that will be doing internationally competitive research.

For a research proposal, if the quality of the research you propose does not meet the best scientific standards, then your proposal is not likely to succeed!

My FP7 M-C IEF proposal succeeded - they liked the science.
My DROUGHTWHEAT proposal did not - they did not like **all** the science!

Have you thought sufficiently about all the things that could go wrong and made contingency plans?

Have you given sufficient justification for the activities planned and budget requested?

[Note: it is better to go over the recommended page limit to ensure you justify items adequately, than leave out **essential** information, but even better to try to do both!]

Have you given enough evidence that the project will achieve its objectives and will have significant impact?

Does it all fit together so that the Background, the Objectives and the Research Plan are all logically related?
It is very important to format the text to make it easy for reviewers to read. Use sub-headings, indents, and break up text with tables or pictures occasionally:

- drug induced recombination between wheat and alien chromosome
- detailed gene-based marker mapping of a yield QTL on 7AL
- testing a candidate gene for the 7AL yield QTL effect
- association mapping of yield QTL effects on 7AL in common and durum wheats
- testing a candidate gene for Lr19 in durum wheat
- transfer of Lr19 alien resistance gene to other wheats using cyrogamies
- allelic variation in Yr genes amongst alien species
- effectiveness of particle bombardment as a vehicle for alien gene transfer
- effects of H. chinesis introgressions on durum wheat pigment contents

Other spin-out publications on techniques and integrative aspects of the science are expected. Aspects of the science developing during the project will also be presented at scientific meetings and through existing EU dissemination platforms, such as the COST Action Tritigen. We expect aspects of the SMARTWHEAT science to impact beyond the immediate confines of research on wheat. The alien gene transfer technologies using drug-mediated induction of homologous pairing and recombination and particle bombardment are likely to have application in other crop species, not just within the grasses, where alien gene transfer has a potentially major role to play in improving the crop.

The research proposed for SMARTWHEAT is strongly aligned with several goals of the European Technology Platform ‘Plants for the Future’ strategic research agenda 2025:

1.2.1 Develop and produce sufficient plant raw materials,
   - deliverable 1.1 – Diverse and affordable raw material for food
   - deliverable 1.2 – Plant raw materials with improved characteristics for producing nutritionally enhanced and more attractive food

3.2.1 Improve plant productivity and quality
   - deliverable 3.1 – Identify key drivers of plant yield productivity and stability
   - deliverable 3.2 – Agronomic changes and plant tolerance to non-biotic factors

3.2.2 Reduce and optimise the environmental impact of agriculture
   - deliverable 3.2.1 – Improve tolerance and resistance to pathogenic and other biotic factors
   - deliverable 3.2.2 – Reduce the utilisation of water resources and fertilisers

3.2.3 Enhance biodiversity
   - deliverable 3.4 – Improve crop and free biodiversity through the introgression of traits from wild relatives

4.1 – Creating segregating populations from core collections and mapping agronomic traits through QTL analysis
   - deliverable 4.1 – Introggression of specific loci into elite varieties
   - deliverable 4.1 – Perform conventional breeding for yield and agronomic performance

5.2.1 Public and consumer involvement
   - deliverable 5.2 – Knowledge of plants

5.2.2 Develop and produce sufficient plant raw materials
   - deliverable 5.2.1 – Diverse and affordable raw material for food

Economic impact

With the dramatic doubling in grain prices during 2007 and subsequent fluctuations that have been a feature of the grain markets so far this season, it will be difficult to quantify the precise European economic benefit of the project. However, the economic consequence of increases in yield delivered through just one of the targeted traits for improvement, disease resistance, would be expected to be significant. A recent CIMMYT quotation [Plant Breeding News, 1 Oct 2006, 1.12] states it:

“Every dollar spent on all wheat research at the International Maize and Wheat Improvement Center (CIMMYT) in Mexico, has generated $27 in benefits when measured only from the resistance it has produced for one disease (leaf rust) in one type of wheat (spring bread wheat). This is a benefit of $5.30 billion (in 1990 dollars)!”

Proposal writing LOVCEN, 10 December 2015
Assuming the same prices and disease incidence/control approaches against leaf rust each year in Spain, employing SMARTWHEAT advances would thus deliver potential annual savings of around €70 million. The same calculations could be done for other European countries where leaf rust is a problem, and for which Lr19 would provide effective natural resistance. Therefore an effective source of resistance to leaf rust for European wheat varieties could potentially provide economic benefits of hundreds of millions of euros every year—a major, and guaranteed impact on Europe’s economy.

The effectiveness of Lr19 in providing protection against leaf rust is illustrated in Fig. B3.1.1, for trials by P2 in 2007. The year 2007 was a bad year for leaf rust in several regions of Italy, associated with generally high summer temperatures which encourage pathogen development. In the absence of chemical fungicide protections, microplots conducted around Italy on advanced breeding lines carrying Lr19 delivered yields, on average, 65% greater than controls (Table B3.1.1) under heavy rust epidemic (West coast). No yield penalty was observed under mild or absent leaf rust pressure (East coast and North).

<table>
<thead>
<tr>
<th>Localities</th>
<th>West-Coast</th>
<th>East-Coast</th>
<th>North</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lr9+ lines vs. controls</td>
<td>166**</td>
<td>107**</td>
<td>107**</td>
</tr>
</tbody>
</table>

Nevertheless, these economic impacts would be present only if resistance to the disease is not readily overcome by the pathogen. A major problem for breeders, which discourages many from turning to alien species for sources of disease resistance is the speed and frequency with which single gene resistance can be overcome by the pathogen. Although an average time for disease resistance genes to remain effective is difficult to give, breeders agree that around 5-20 years is a realistic range. However, a strategy to extend the useful

Then finally, when you think you have finished:
Get your wife/husband/girlfriend/mother/cousin/man-next-door to read through the proposal because they will actually read the words that you wrote, whereas usually you will read what you expect to read! Competition for research funds, especially EU and other international research funds, is usually very/extremely high. Success rates, even for good proposals, are often only 1 in 10, so don’t be surprised if your first attempt at proposal writing doesn’t succeed. The REGPOT-2009-1 success rate was only 5.2%!
For many H2020 Research and Innovation proposals they say that they expect to fund “up to one proposal for each research topic”!
Make sure your proposal satisfies all the **evaluation criteria**!
If you don’t satisfy all the evaluation criteria ...

*Easy! .... You don’t get the money!*

So, to summarise your **philosophy** for success:

1. **Get rid of the fog in the two bars**
2. **Check all the Evaluation criteria are implemented**
3. **If it’s research - make sure it is World class!!**
4. **Read and implement all the instructions**
5. **Give evidence for statements and enough detail**
6. **Make sure your proposal text is consistent**
7. **Make sure your proposal is good value for money**

Then, your proposal will be the best, and ..... 

When your proposal gets to the evaluators …

by the end of the reading the proposal the evaluator (assessor/referee/reviewer) needs to be saying -
‘This looks a good quality proposal, with very competitive science from proposers **following all the instructions.**’
‘This is an excellent project concept, clearly justified and implemented with a **convincing amount of detail.**’
‘It looks as if the proposed project will be managed competently, and will have a **significant impact.**’
‘It also looks **excellent value for money!** Indeed, …’
‘It looks the **best** proposal that I have reviewed. So …’
‘I shall give it **maximum score** in every section, and ..’
‘I recommend they are given the money!’

**WORKSHOP EXERCISES**

To finish today here are two exercises for you:

1. Identifying the information content of text
2. Identifying tasks to maximise project impact

**WORKSHOP - text information content**

Here again is the poor example of a H2020 Task description (**the first draft**):

<table>
<thead>
<tr>
<th>Background</th>
<th>Why</th>
<th>What</th>
<th>How</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>“A pan-European consumer survey across 7 countries (XXXX) will be conducted with the aim to quantify differences across EU countries, consumer segments and settings with respect to consumers’ knowledge, perception, and valuation of selected EU/national/regional food quality labels and consumers’ perceived barriers to buy products promoted by EU/national/regional quality schemes. Also consumers’ evaluation of additional/modified policy measures (e.g. adjustment of labels or standards behind the labels) to promote the confidence in and consumption of sustainable products will be investigated. In the framework of the WP we empirically test the influence of selected”</strong></td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

Proposal writing LOVCEN, 10 December 2015 30
The final version of the task description would have more impact as it gives *more details of the work*:

<table>
<thead>
<tr>
<th>Background</th>
<th>Why</th>
<th>What</th>
<th>How</th>
<th>Result</th>
</tr>
</thead>
</table>

"A pan-European consumer survey will be conducted to quantify differences across EU countries, consumer segments and settings with respect to consumers’ knowledge, perception, and valuation of selected EU/national/regional food quality labels and consumers' perceived barriers to buy products promoted by EU/national/regional quality schemes. Consumer evaluation of additional/modified policy measures (e.g. adjustment of labels, ...) to promote confidence in and consumption of sustainable products will also be investigated. The survey will be conducted in 7 countries: France, Germany, Hungary, Italy, Norway, Serbia and UK, with n = 600 per country. To ensure representative and comprehensive samples, data collection will be subcontracted to a major international market research company. The same survey will test empirically the influence of selected EU/national/regional food quality labels by cognitive, affective and normative processes within an Integrated Choice and Latent Variable (ICLV) model. The ICLV model is an innovative approach merging structural equation modelling with choice experiments, ... This will transcend previous consumer research on FQS which relies on recognition analysis (London Economics, 2008), ...."

So, have a go yourselves at breaking down the following Task description from an H2020 Work Package into different types of information:

<table>
<thead>
<tr>
<th>Background</th>
<th>Why</th>
<th>What</th>
<th>How</th>
<th>Result</th>
</tr>
</thead>
</table>

**Task 2 Qualitative research: Consumers’ practices concerning food quality schemes**

Qualitative research will be undertaken to investigate how EU consumers understand, perceive, value, use and trust EU/national/regional food quality labels and public procurement measures to promote sustainable food chains. Attention is also given to the image of products with EU/national/regional food quality labels. Special emphasis is on better understanding gaps between consumers’ stated valuation of products promoted via EU food sustainability labels and their actual food practices including planning, purchasing, using, cooking, eating and disposal. In this respect, consumers’ perceptions and requests regarding additional or adjusted policy measures (e.g. assigning responsibility for sustainable consumption to the political level in the case of public procurement) will be investigated. The qualitative research will build on [ethnographic fieldwork](#) concerning consumption practices among 4-6 households in 7 participating countries (France, Germany, Hungary, Italy, Norway, Serbia and the UK) to better understand and deepen the results from the quantitative study*. This approach is central to understanding consumer’s practices as well as for impact evaluation in WP 5, 6 and 7. Inspired by the methodology developed by De Certeau and his team (1994), as well as Millers’ work on shopping (1998) we will conduct regular contextual inquiries with informants from different generations within the same family. Practices are interwoven in *habitus* and uses and the ethnographic long time field work, with several visits during 3 seasons, will be based on participant observation, with film and photography to permit better documentation and later self-reflection. This will deliver findings on the "biography of family food consumption practices" that will deepen, complement and illustrate the quantitative results, as a part of the mixed method approach. [* described in Task 1.]*
WORKSHOP - maximising project impact

It is particularly important for Horizon 2020 that you provide the Expected Impact for the chosen topic.

So, what you write in the proposal to describe the project activities must convince the reviewer that you will achieve your goal.

Now it’s your turn, working in groups, to identify what is needed to achieve maximum project impact, using the FP7 REGPOT-2010-5 scheme as an example: funding for a single partner (research entity) in a Western Balkan Country (WBC) to improve its research capacity.

Expected impacts for FP7-REGPOT-2010-5 (for WBCs):

1. Better integration of the Western Balkan Countries research organisations into the European Research Area and in the FP7;
2. Accelerate the setting up of sustainable partnerships between RTD entities established in Western Balkan Countries, Member States and Associated Countries;
3. Boosting regional cooperation contributing to socio-economic needs;
4. Upgrading the RTD capacity and capability (human potential: number of new researchers and training of research staff, improvement of research management, scientific equipment);
5. Upgrading the quality of research carried out by the selected research entities.

First part of the exercise:
What activities would you need to carry out to achieve the three REGPOT Expected Impacts in red text?

Feedback discussion

Second part of the exercise:
How will you tell all your stakeholders about your activities and achievements?
Think in terms of the questions:
• Who (types of stakeholders)?
• What (sort of information)?
• How (will you tell them)?
• Where (will you tell them)?
• When (will you tell them)?

Feedback discussion