Developing a proposal summary for engaging competent partners and getting valuable feedback at an early stage

EARMA 2019
Who is Nikolaos Floratos

- **Founder** of Funding Expert Academy programmes that masters individuals in EU funding programmes and advances successful **proposal developers** across Europe
- **Active** in european funding industry since 1997 (**20+ years**)
- **EC** expert/evaluator since 2003 (**14+ years**)
- **Author** of the ebook “Learn from the Horizon 2020 champions” downloadable from [www.NikolaosFloratos.com](http://www.NikolaosFloratos.com)
- **Trained and coached hundreds** of organisations on exploiting successfully EU funds and advancing their sustainability
- Globally **recognised** as one of the **most influential** and **inspiring speakers** and **trainers** on Horizon 2020 with hundreds of speeches and trainings in 24+ countries including overseas and more than 70 linkedin recommendations
- Organiser and host of the Horizon 2020 virtual summit (horizon2020summit.eu) with training sessions by 35 top experts in Horizon 2020 topics and 2500+ participants from 30 countries
- **Engineer** (B.Eng, BA and M.Sc) and MBA
- **Phd** Researcher in student **engagement** and **online courses**
- Business Angel and Member of European Business Angel network
How experts develop winning H2020 grant applications

H2020 Funding Expert Transformation FET™ Formula

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Horizon 2020 Funding Expert Transformation Recipe

Step 1: Master the full proposal development process
Step 2: Impress evaluators with your grant application
Step 3: Master H2020 jargon and identify the most suitable and promising Horizon 2020 calls

From Struggle

Daily Habits

5 Fingers’ Technique
I.C.R.E.A.T.E.S. system
C.R.I.T.E.R.I.A. Formula

To Success

B.U.N.D.L.E.R. Habits

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Example: Imagine...

- A professor at a university department for software development for cloud applications.
- He/she and his/her research group have experience on security including cybersecurity, access controls and cloud computing
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Outcome of 5 Fingers’ technique

“DS-2-2014: Access Control” seems to fit best the experience, profile, resources and ambition of our research group.
The call is for “Innovation Actions”
Funding between €3m and €8m EURO
The next steps are now:
1. I.dea creation
2. C.onnect
3. R.ead
4. E.
5. A.
6. T.
7. E.
8. S.
Main sections in an H2020 call topic

- Scope
- Expected Impacts
The Scope

The focus is on the development and testing of usable, economic and privacy preserving access control platforms based on the use of biometrics, smart cards, or other devices.

The solutions are to be installed and tested in a broad-band network, giving access to smart services running over networks with state-of-the-art security, avoiding single points of failure.

Proposed work should include the management of the access rights in particular for the service providers, ensure the security and privacy of the databases, facilitate a timely breach notification and remediation to the user, and reduce the insider threat.

The proposed solutions have to guarantee interoperability and portability between systems and services, sparing the user to have to install a platform, service or country specific technology.

Proposed work could assist the objective of implementing a secure information sharing network.
How to use the “Expected Info” section in a call topic

Expected Impact:

• Actions supported under this objective will deliver secure, but userfriendly, access to ICT systems, services and infrastructures, resulting in a consumerisation of devices or access control.

• The level of security of online services and critical infrastructures protected by these access systems should be demonstratably higher than by the state-of-the-art approach.

• The proposed solutions are expected to support the creation of commercial services making use of electronic identification and authentication.
Idea proposed

- Get access to all security restricted areas: banks, airports, or public administration, based on a single mobile biometric security clearance.

Source: TH2020
The C. Element from the I.C.R.E.A.T.E.S. System

C. ___________

- **Input** to Connections is our **idea** (3-4 sentences) that we have internally validated.

- **Output** is
  - To **externally** validate the idea
The R. Element from the I.C.R.E.A.T.E.S. System

R. Read and in specific study the reference material related to the identified Horizon 2020 topic from the previous step and in specific

1. Horizon 2020 Work programme
2. Guide for submission and proposal evaluation
3. An outlook on the application template
4. Material from infoday events (presentation slides, referenced documents and links in the slides)
5. Outlook on Showcased previously projects funded (from CORDIS) and especially those that may be referenced in the infoday slides as good examples so far
6. Frequently Asked Questions (SOS!) by participants on Horizon 2020
7. Frequently Asked Questions (SOS) for Horizon 2020 evaluators 2020
The E. Element from the I.C.R.E.A.T.E.S. System
The E. Element from the I.C.R.E.A.T.E.S. System

• E. __________ the essentials of your proposal idea and approach in 3-3.5 pages summary as shown in the next slide:

• Output of this step is the proposal summary
1. **Scope/Aim/Purpose** (based on your idea)

2. **Name/Acronym and Title**

3. **Problems/Rationale** (why our project is needed)

4. **Solutions/Objectives as actions** (verbs)

5. **Results/Outcomes** (nouns)

6. **Our target group** (Who will benefit from each result)

7. **Workplan** (which activities for implementing each result)

8. **Consortium Profile** (expertise needed for implementing each of the activities)
How to use the “Expected Info” section in a call topic

We highlight and focus on outputs/benefits:

Expected Impact:

• Actions supported under this objective will deliver secure, but userfriendly, access to ICT systems, services and infrastructures, resulting in a consumerisation of devices or access control.

• The level of security of online services and critical infrastructures protected by these access systems should be demonstratably higher than by the state-of-the-art approach.

• The proposed solutions are expected to support the creation of commercial services making use of electronic identification and authentication.
Tip!

The analysis of the expected impacts will direct us to the initial problems that our proposal should deal with. e.g.

1. consumerisation of devices or access control -> **Fragmentation or low protection in accessing cloud based services**

2. Security of online services demonstratably higher than the state-of-the-art->**Current security of online services is weak**

3. Creation of commercial services ->**Most of commercial services do not use reliable if at all electronic identification and authentication**

These problems will be analysed thoroughly at the PPO/Proposal Summary
How to build a draft workplan for the Proposal Summary match with the needed profile
The Scope (Refocused)

We focus on action verbs and their objects:

The focus is on the development and testing of usable, economic and privacy preserving access control platforms based on the use of biometrics, smart cards, or other devices.

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Workpackage outline structure (provisional) to consider for PPO/proposal summary

- WP1: Design, Development, Validation of biometric access device
- WP2: Testing of access to smart services in close to operation environment
- WP3: Algorithms for Access rights management
- WP4: Secure Cloud Databases
- WP5: Interoperability
- WP6: Application scenarios and Business Plan
Profiles & Expertise needed, to be used in PPO, Summary

1. Research institutes/Universities with expertise biometrics for designing and validating access devices and ICT companies with expertise in developing biometric systems

2. Online payment services (e.g. banking/credit card, paypal platform(s) as testbeds as well as other smart service provider (e.g. online booking systems, etc)

3. Research Institutes/Universities with expertise in access rights management and algorithms

4. Cloud providers and ICT companies with experience on cloud and secure systems

5. Various cloud service providers with different smart services for integrating seamlessly their services

6. A company with expertise on Innovation and Exploitation management

N.B: Also, an organisation with expertise in coordinating such project
Plus an organisation (preferred EU policy advisor) expert in communication
Proposal Summary Uses

A great proposal summary (max 3-3.5 pages) is your main tool for

• Receiving **fruitful feedback** on your project
• Engaging **competent partners** (if applicable/necessary)
• Including **supporters** and **funders** (e.g. getting **Letters of Support** from **Key Stakeholders**)
• A great **foundation** for a great proposal
• Engaging **resources** for developing further the proposal
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