



## **DAY ONE SESSION 1**

**DEVELOPING COMPETITIVE R&I PROPOSAL**

# **TIPS AND TRICKS FOR SUCCESS & PITFALLS TO AVOID**

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# Research & Innovation Basics

GUIDANCE THROUGH THE ESSENTIALS OF R&I PROJECTS



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# Read & Analyse A Topic

HOW TO BREAK-DOWN THE TOPIC INTO ELEMENTS



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# Proposal Main Sections

HOW TO WRITE A R&I PROPOSAL - STEP BY STEP



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# Key Takeaways Questions and Answers



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# Research & Innovation Basics

GUIDANCE THROUGH THE ESSENTIALS OF R&I PROJECTS





# ‘Research Project’ – Definition

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- A series of activities (**PERT**) aimed at achieving specific objectives and results/ deliverables (**LFM**) within a defined time period (**Gantt chart**) using a defined budget and resources (**Budget**)
- Besides the IDEA, a project should have clearly identified...
  - Problem(s) to be addressed or opportunity(ies) to be realized
  - Stakeholders, target groups, and users
  - Coordination, management, and reporting arrangements (Tec./Fin)
  - Expected results, monitoring, and sustainability



# Everything is the project idea

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- The trademark of a competitive proposal is: well-defined project **IDEA**
- Present your idea in the most comprehensive, **SIMPLE** and coherent way – avoid repetition, complex sentences, complicated words, unusual abbreviations
- Idea – **ALIGNMENT** to the call/donor objectives and priorities
- Presentation of the idea – use **TEMPLATES** and address evaluation criteria

***READ ALL INSTRUCTIONS CAREFULLY AND FOLLOW THEM***



# Typical Proposal Evaluation Sequence

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Cover page

Abstract – 1<sup>st</sup> impression, no score

Introduction and Objectives

Problem Statement

Impact/ Sustainability

Research plans: Methodology/ Activities/ WPs / Deliverables

Budget table



# Typical Proposal Writing

The problem or need

Relevance

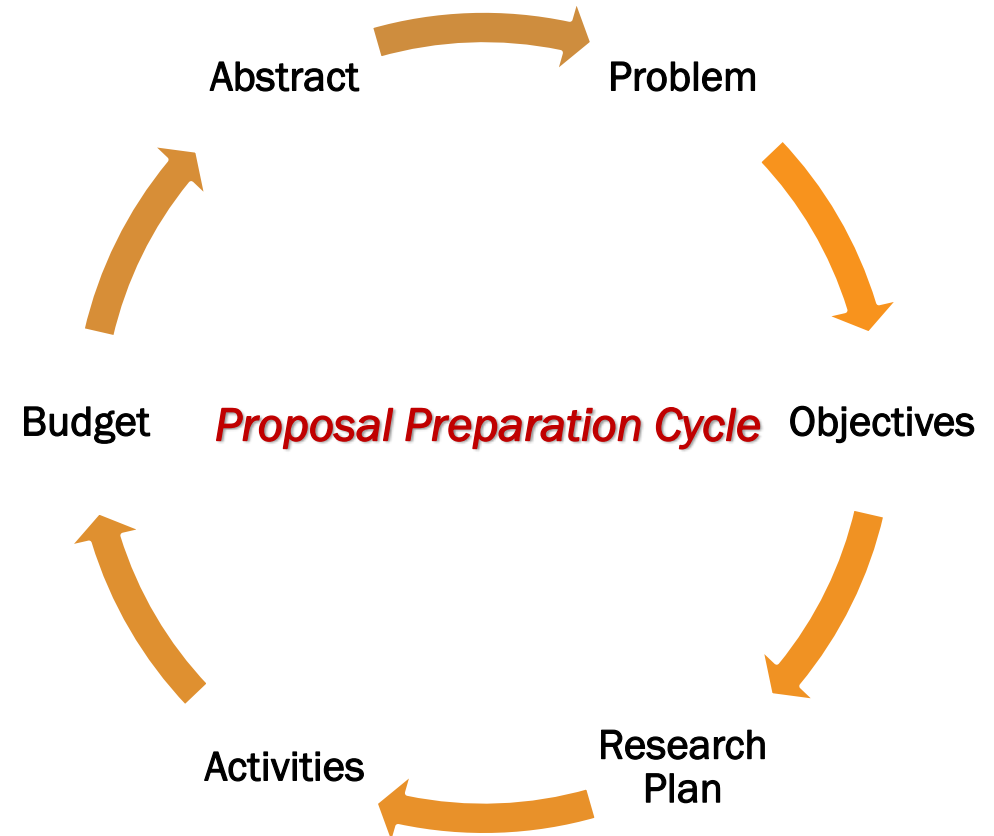
Objectives

Research plan

Activities/ WPs

Budget

**Abstract**





# Requirements for a Good Proposal

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Attractive **Title** and **Acronym**;

Good and Comprehensive **Abstract**;

Novel Idea and Clear **Goals**;

**SMART Objectives, Results, Deliverables**;

Clear Methodology;

Defined Action Plan and Budget;





# Title and Acronym

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The title = the idea + problem + objective

Be as short and clear as possible – one sentence

Use key words from the call itself

Brainstorm for key words, then puzzle it

The acronym: easy to pronounce, easy to remember

Avoid jargon – be specific

## Example

**SPRING**: Mediterranean **S**cience, **P**olicy, **R**esearch & **IN**novation **G**ateway

**EDUCAMP**: **EDU**cation for sustainable development beyond the **CAMP**us

**BioGuard**: Protecting Crops via Bio-Control Agents in Organic Agri.



# **Abstract/ Overview/ Introduction**

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Low (0) score – high importance – short section

Convince assessors at early stage – you have 60 sec. !

Highlight the problem and why the project is necessary to address it

Explain the objectives and their importance



## **Overall Goal/ General Objective**

- It is the goal of the overall program of which the current application is a part
- It is not the specific goal of the current application

# **Specific Objectives (Outputs & Deliverables)**

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They should be brief, focused, and limited in scope

Each objective should flow logically into the next one - bullets (SO1, SO2,...)

Avoid overestimation (capacity, budget, time) → indicators/targets

## **SMART**

- **Specific:** limited in scope and responding to the topic/ call/ country
- **Measurable:** can be monitored for verification of progress
- **Achievable/Accountable:** based on the available expertise, resources.
- **Realistic:** not a dream
- **Time-bound:** to be realized during the project timeline

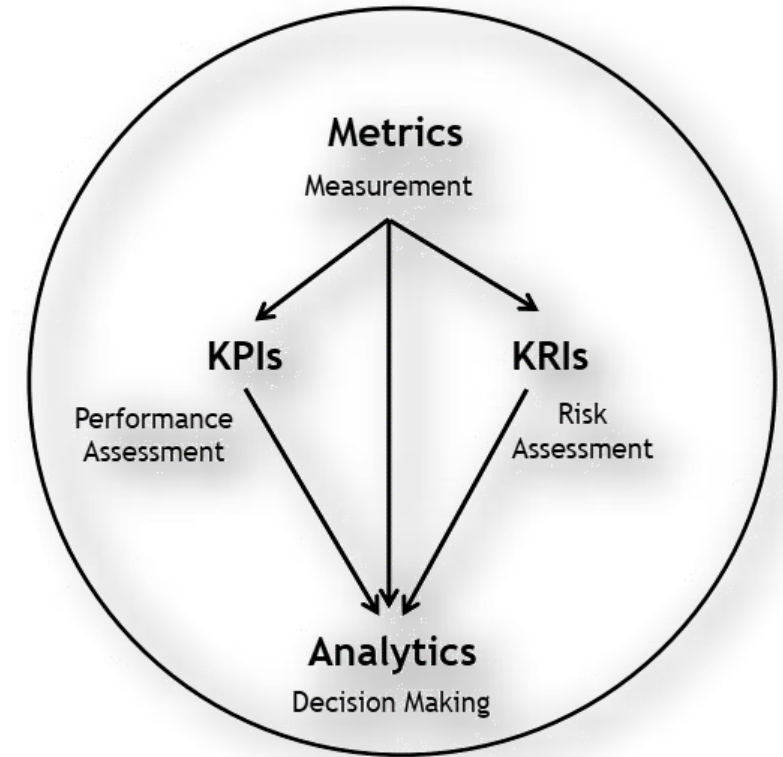


# METRICS - KPIs - KRIs

**Metrics** are your “business as usual” measures that still add value to your organization/project but aren't the critical measure you need to achieve.

**Key Performance Indicators (KPIs):** are key measures that will have the most impact in moving your project forward.

**Key Risk Indicators (KRIs)** are used to indicate potential risks.



# QUESTION



Increase Water efficiency in Delta to 30% by the end of 2024 under the supervision of Ministry of Water Irrigation and Ministry of Agriculture

## SMART

### Objective

To increase Water efficiency in Delta

### KPI

% of Water efficiency

### Target

30%

### Timeline

2024

### Owner/Resp.

Ministry of Water Irrigation and Ministry of Agriculture



# Requirements for a Good Project

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A good proposal (clear, coherent, logical, SMART);

Project-Call alignment;

Strong coordinator and consortium building on complementary strengths;

Reasonable, justified budget;

Avoid ethical issues, when possible;

Be innovative (idea, methodology, management, writing..).



# Requirements for a Good Project

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## Project-Call alignment:

- Study the guidelines and templates carefully;
- Read and analyze the call text → extract key words;
- Discuss with other involved partners, collect ideas → common understanding + vision of the proposed idea;
- Translate brainstorming into a project brief, circulated, updated → draft CN;
- Share the draft with external expert(s) → feedback and adjustments.



# Requirements for a Good Project

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## Strong Coordinator and Consortium;

- Show high commitment;
- Diversity and comparative advantages: academia, industry, SMEs\*, NGOs, authorities, stakeholders\*; *\*especially with calls of higher TRL*
- Strong track record, personal and institutional, in scope of the project/call, preferably in similar EU;
- Geographical coverage, when possible;
- WHERE? PRIMA/CORDIS/PORTAL....., keynote speakers of relevant international conferences, top-cited authors, PRIMA Analytical Tool (Feb.2020).





WHY DO WE FAIL?

# Most Common Reasons for Failure

- x Weak project **IDEA** (novelty and applicability);
- x Low **RELEVANCE**: unimportant problem – not aligned to donor priorities;
- x Weak **CONSORTIUM**, partners overlapping, unjustified;
- x Lack of **EXPERTISE** (technical, management) and/or infrastructure;
- x Unfocused **APPROACH**; vague **OBJECTIVES**;
- x **UNREALISTIC**: the amount of work proposed, objectives, absence of clear indicators/targets;
- x Uncertain long-term **IMPACT** and/or lack of future direction;
- x Over-/ underestimated **BUDGET**;
- x Poor/unclear **LANGUAGE**.



# Read & Analyse A Topic

HOW TO BREAK-DOWN THE TOPIC INTO ELEMENTS





# HOW TO READ HE/PRIMA TOPIC?

## I. The Topic Title

IA – Topic 1.3.1: Implementation of analytical tools and digital technology to achieve traceability, authenticity control of traditional Mediterranean foods

Innovation  
**Action**

Select the topic Ref # on  
the submission system

Applied solutions

Be specific, selective, not  
diffused

High **TRL**

Scope/specific objective of  
the topic

Engagement of **Stakeholders**  
and **private** sector



# HOW TO READ HE/PRIMA TOPIC?

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**CHALLENGES**



**SCOPE**



**EXPECTED IMPACT**



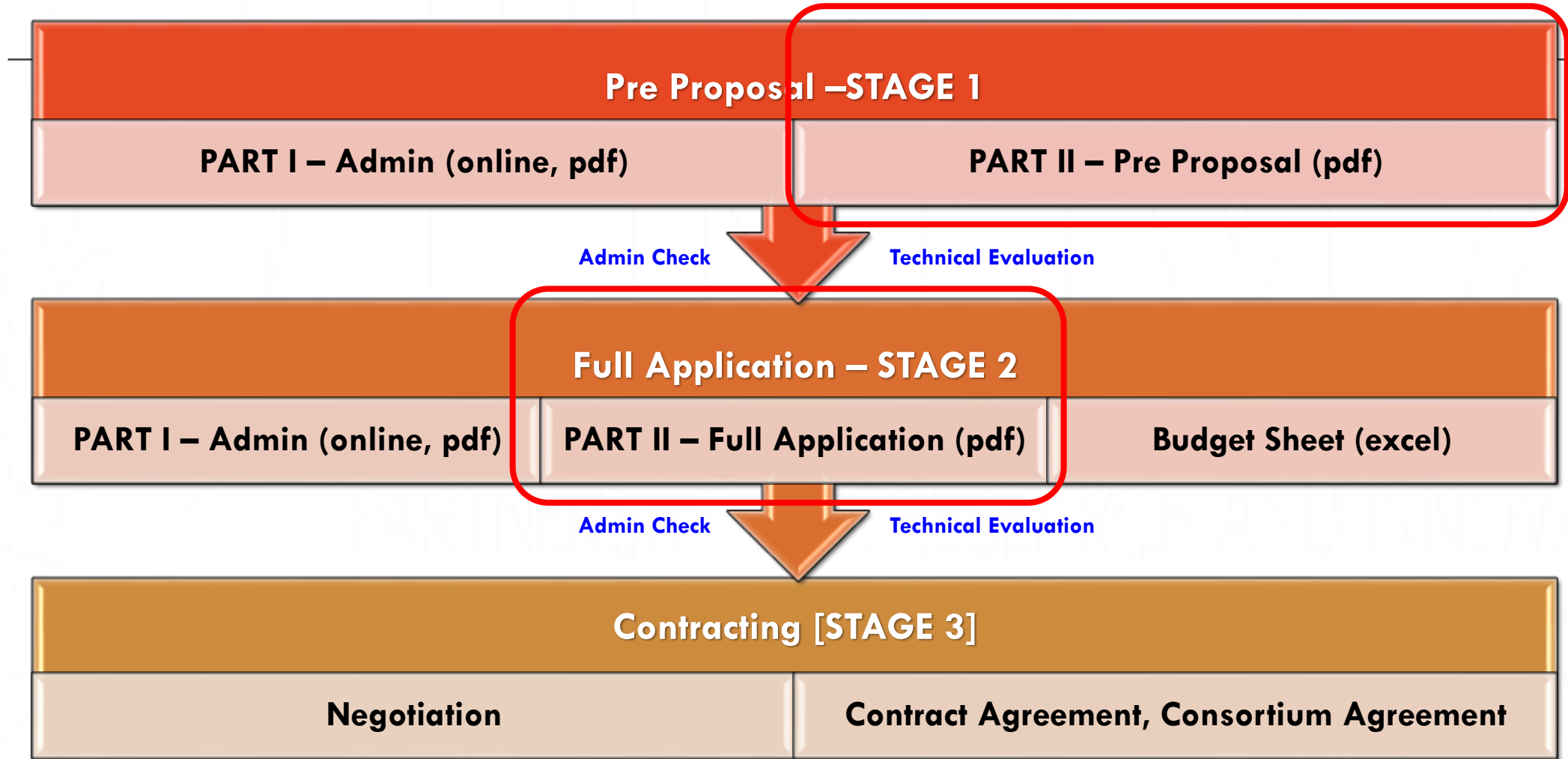
# Proposal Main Sections

HOW TO WRITE A R&I PROPOSAL – STEP BY STEP





# PRIMA Application



# MAIN SECTIONS

## 1. Excellence

- 1.1 Objectives
- 1.2 Relation to call and/or topic
- 1.3 Concept and methodology
  - (a) Concept
  - (b) Methodology
- 1.4 Ambition

Pre Proposal  
STAGE 1



## 2. Impact

- 2.1 Expected impacts
- 2.2 Measures to maximise impact
  - a) Dissemination and exploitation of results
  - b) Communication activities

Full Proposal  
STAGE 2

## 3. Implementation

- 3.1 Work plan — Work packages, deliverables
- 3.2 Management structure, milestones and procedures
- 3.3 Consortium as a whole
- 3.4 Resources to be committed

## 4. Members of the consortium

- 4.1. Participants (applicants)
- 4.2. Third parties involved in the project (including use of third party resources)

## 5. Ethics and Security

CSA





# PRIMA Pre Proposal Sections

(max 10 pages)

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## 1 - EXCELLENCE

1.1 **Objectives:** *overall and specific objectives*

1.2 **Relation to call/ topic:** *how your proposal addresses the challenge & scope*

1.3 **Concept and Methodology**

(a) **Concept:** *main ideas, models, or assumptions*

(b) **Methodology:** *overall methodology, activities*

1.4 **Ambition:** *beyond the state-of-the-art*

## 2 - IMPACT

2.1 **Expected Impacts:** *expected impacts mentioned in the work programme*





# PRIMA Pre Proposal Sections

## Section 1 – EXCELLENCE

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### 1.1 Objectives: overall and specific objectives

- S.M.A.R.T Objectives.
- In **Bullets** (SO1,SO2...), present the overall/general objective(s) of the project.
- Be **PRECISE** and **SPECIFIC** (KPIs).
- Avoid too ambitious goals, over estimations.
- Read & **Reflect** on the call text.
- Avoid too long narrative description, implementation steps, blablabla.....
- Define **Sites**/geographical coverage, **Stakeholders**/target groups, main deliverables...



# PRIMA Pre Proposal Sections

## Section 1 - EXCELLENCE

### 1.2 Relation to call/ topic: *how your proposal addresses the challenge & scope*

- Reflection from the call text, again.
- Alignment with **PRIMA SRIA + CALL + TOPIC** (+ **EU** relevant policies and strategies)
- You can use a tabular form, or any other format to summarize your points.
- **Relevance** to the particular demands of the **MEDA countries**, where the action will be organized, and the relevant sectors (including synergy with other initiatives, built on results of previous actions/projects)





# PRIMA Pre Proposal Sections

## Section 1 – EXCELLENCE

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### 1.3 Concept and Methodology

(a) Concept: *main ideas, models, or assumptions*

- Explain the **Overall concept** underpinning the project.
- Identify **interdisciplinary** among **stakeholders’/PARTNERS’** knowledge & roles.
- Include measures for **public/societal engagement**.
- **Positioning the project**, spectrum ‘idea 2 application’, ‘lab 2 market’.
- **Technology Readiness Levels** (*initial TRL + the final TRL*).
- Describe any national or international R&I activities which will be linked with the project (**synergy and complementarity**);





# PRIMA Pre Proposal Sections

## Section 1 – EXCELLENCE

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### 1.3 Concept and Methodology

- (b) Methodology: *overall methodology, activities* - *from objectives to results?*
- Describe **overall methodology** (applied approach – not detailed activities and steps)
  - Present the **state-of-the-art** of the technologies used and its rational.
  - **Present the logic behind the Workpackages structure, not the details.**
  - Distinguishing, as appropriate, activities indicated in the relevant section of the work programme, e.g. for research, demonstration, piloting, first market replication, etc;
  - Describe **gender dimension**, i.e. sex and/or gender analysis.

Please note that this question does not refer to gender balance in the teams in charge of carrying out the project but to the content of the planned research and innovation activities. For guidance on methods of sex / gender analysis and the issues to be taken into account, please refer to: [http://ec.europa.eu/research/swafs/gendered-innovations/index\\_en.cfm?pg=home](http://ec.europa.eu/research/swafs/gendered-innovations/index_en.cfm?pg=home)



# PRIMA Pre Proposal Sections

## Section 1 – EXCELLENCE

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### 1.4 Ambition: *beyond the state-of-the-art*

- What the proposed project would advance/go beyond the state-of-the-art, and the extent the proposed work is ambitious (**Novelty** of your project and added values).
- Describe the **Innovation Potential** (e.g. ground-breaking objectives, novel concepts and approaches, new products, services or business and organisational models). Where relevant, refer to products and services already available on the market. Please refer to the results of any patent search carried out.
- why you choose this/these technologies, **advantages over alternatives**.
- In brief, also describe the **nature and size of the tackled market**.



# PRIMA Pre Proposal Sections

## Section 2 – IMPACT

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### 2.1 Expected impacts: *mentioned in the work programme*

- Be CLEAR and SPECIFIC to your proposed project and its objectives, avoid general terms.
- **USE QUANTIFIED KPIs AND TARGETS/VALUES, Means of VERIFYING/MEASURING.**
- **Classify Impacts:** Social, Economic, Environment, Political, Technological advancement.
- Define **TARGET GROUPS** and **BENEFICIARIES** (i.e. small farmers, organic food market...) and the geographical coverage (involved countries).
- Describe how your project will contribute to (**Topic: Expected Impact**).
- Do not forget the **Cross-cutting areas** (i.e. ICT revolution, gender issue,....)
- Refer to PRIMA SRIA, EU, National, Regional, International...



# General Remarks – Pre Proposal

- Two Sections → Equal Scoring → **Equal Attention.** *(max. score /5)*
- Only **10** pages, use it **precisely** and concisely.
- Don't waste space on the implementation/details.
- **Quantify**, Quantify, Quantify, Quantify ...
- Use tables, figures, and diagrams, but not extensively.
- Present **Dissemination**, **Communication**, and **Exploitation** plan, *in brief*.
- Show **INTERDISCIPLINARY** of **PARTNERS**, stakeholders, end users...
- Show **NOVELTY** (process, solution, methodology, presentation) and **RELEVANCE**.
- **NETWORKING** and **SYNERGY**





# Key Takeaways Questions and Answers







**START & SCREEN THE CALLS!**



**DON'T BE BIASED!**



**BUILD YOUR DATABASE!**



**FIND AND CONTACT THE PC & CORE PARTNERS!**



**PARTICIPATE AND NEGOTIATE!**

- ✓ Engage **Stakeholders/end-users**.
- ✓ Relevance to .....etc.
- ✓ **Justify**: technologies, sites, partners...
- ✓ Check **Numbering ...**
- ✓ **Invent** tools, diagrams, charts,....
- ✓ Measurable **KPIs**, Quantify.....
- ✓ **Polish & clear**.
- ✓ Contact **TICO, PMU, NCP**.



**QUESTIONS?**

**ANSWERS!**

***END OF THE SESSION***

***THANK YOU FOR YOUR ATTENTION***

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