

# Preparing the application

**Oskar Otsus** 

May 2013

Croatia



# 9 steps from idea to project

1	Project idea	-6
2	• FP7 call opening	-4
3	Building the consortium	-4
4	Writing the application	-3
5	<ul> <li>Submitting the application</li> </ul>	0
6	• Evaluation	+2
7	Positive results	+3
8	<ul> <li>Negotiations and CA</li> </ul>	+4
9	<ul> <li>signing the GA, start of the project</li> </ul>	+6



## **Building your team**

- Work out the basic work plan of your project
- •What kind of partners do you need?
- •Take into account:
  - —Project type
  - Minimum and maximum budget
  - —Special requirements in WP
    - Involvement of SMEs
    - Cooperation with third countries
    - etc



## Who to invite?

- Friends and partners
- Friends of friends
- Partner searches, ask NCPs
- Conferences and partnering events

Every partner has to have an important role!



## Agreements between partners

#### **Confidentiality Agreement - voluntary!**

- Is signed in the beginning of the project preparations
- Defends confidential information and IPR
- Regulates:
- What is to be considered confidential information
- Using the information and restrictions
- Penalties in case of misuse

#### **Memorandum of Understanding - voluntary!**

- Is signed in the beginning of the proposal writing process
- Regulates:
  - Proposal preparation order
  - Good will (competitive proposals)
  - Costs, etc
- Guides: www.ipr-helpdesk.org



# **Proposal writing**

- Prepare a work plan
- Get familiar with rules
  - Work Programme
  - Guide For Applicants
  - Financial guidelines
  - etc
- Create an ECAS account
- Share the proposal writing between partners
- Don't be afraid to ask for help and oppinion of a friend
- •Don't leave things on the last minute!



# Preparing the budget

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# **Budget – different cost items**

- Personnel costs
  - Number of working months (full time)
  - Person month rate
- Other costs
  - Travel costs
  - Durable equipment (depriciation)
  - Consumables
  - Etc
- Subcontracting
- Indirect costs (overhead)



## **Personnel costs**

You must know the value of your **person month** 

**Person month = salary + social charges + regular bonuses** 

#### **Example:**

2 researchers are participating in an FP7 project and they must calculate their personnel costs:

1st researchers person month rate – 2500 €, works 24 months

2nd researcher person month rate – 1500 €, works 24 months, 50% of his time

Their personnel costs: 2500\*24 + 1500\*12 = **78 000 €** 

Person month rate to use in application: 78 000 / 36 = 2167 €



# Participants portal. Submitting the application

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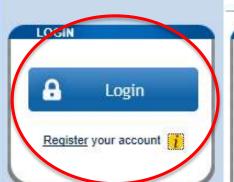


#### RESEARCH & INNOVATION

#### Participant Portal

Funding

European Commission > Research & Innovation > Participant Portal > Home



WELCOME

Home

Welcome to the Participant Portal

Documents

The Participant Portal is your entry point for electronic administration of EUfunded research and innovation projects, and hosts the services for managing your proposals and projects throughout their lifecycle. Currently the portal covers mainly actions under the 7th EU-Framework Programme for Research and Technological Development (FP7). In the future, its coverage will be extended to other programmes in the area of research and innovation.

My Organisations

Experts

Support

#### **NEED HELP?**

Frequently Asked Questions (NEW) Experts area (Quick

What does it offer today?

http://ec.europa.eu/research/participants/portal/page/home

the ur ation

submission user manual

- Presentations (NEW) Submission of proposals
- Contact the Helpdesk

- Depending on your role in projects and organisation, you can view information on projects, negotiate your grant agreement, manage amendments, submit financial and scientific reports or assign or revoke access rig review projects.
- If you are interested in participating as an expert for the European Commission, you can join the database of independent experts for European research and innovation

#### WHAT'S NEW

Participant Portal V3.5 (12/2012)

Support for electronic-only submission of Financial Statemente (when annlicable)

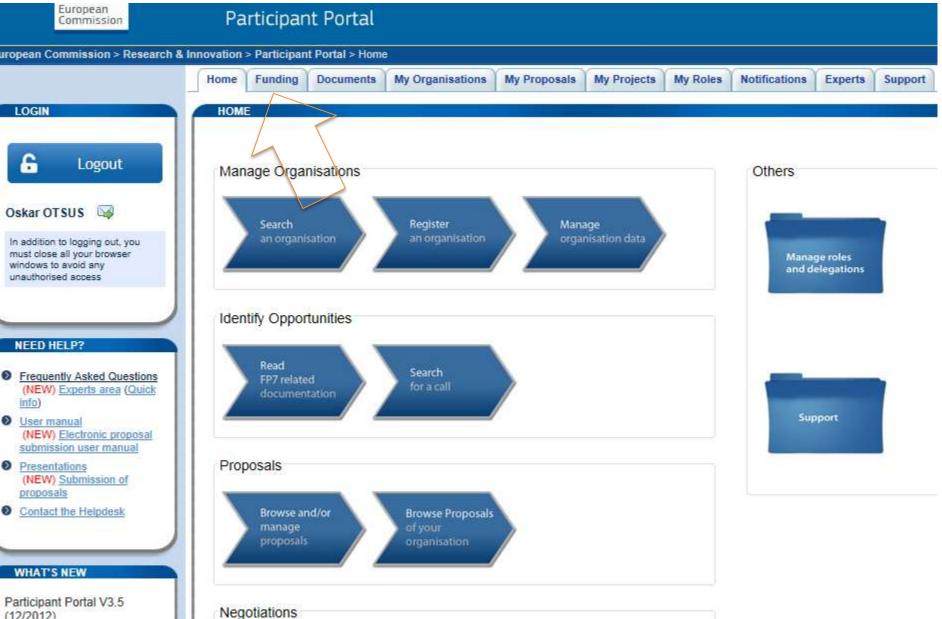
#### Forthcoming functionalities

- Expert evaluators will be able to manage the administrative details related to their work as po
- The currently separate electronic proposal submission system will be replaced by a new sys
- Direct access to FP7 related information and documentation.

organisation's data.

Depending on your roles

data for other persons.



#### WHAT'S NEW

(12/2012)Support for electronic-only submission of Financial

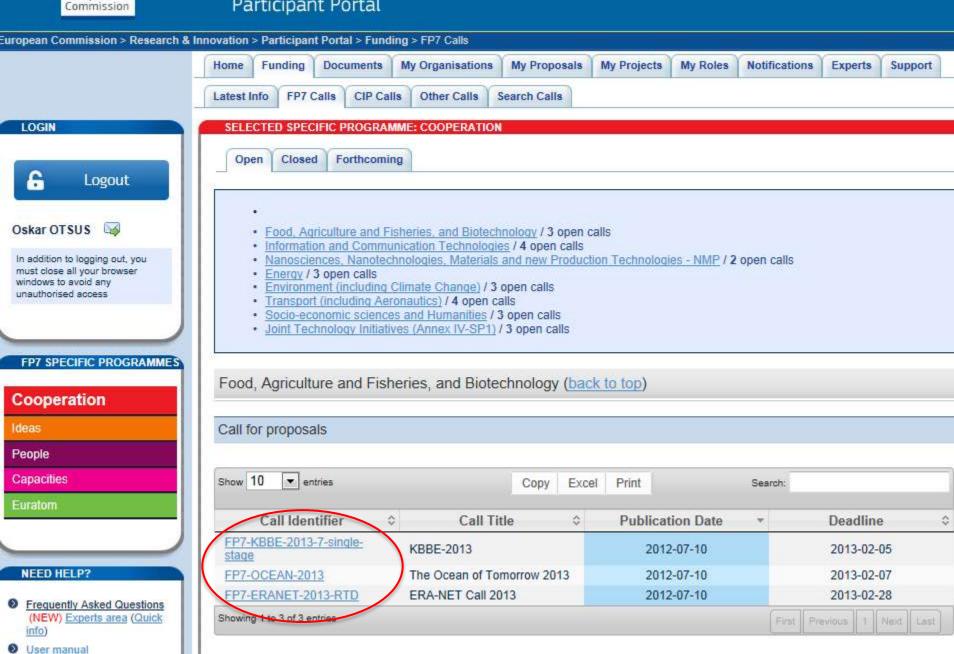
Browse and/or

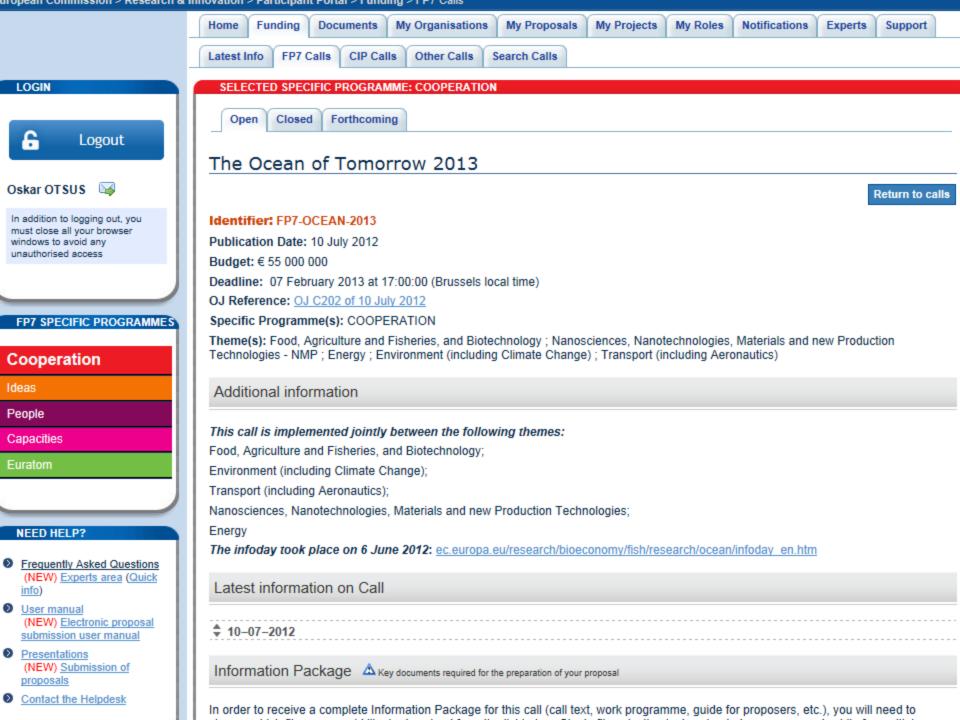
- Statements (when applicable) Role management:
- new role of FSIGN /Einannial Statement

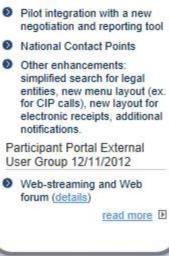


#### RESEARCH & INNOVATION

#### Participant Portal









### Additional Documents Useful documents on the call and on the framework programme in general

Click to download file

Extract from Work Programme 2013: Call text "The Ocean of Tomorrow 2013" - provided for convenience only Communication from the Commission to the Council, the European Parliament, the European Economic and Social

Committee and the Committee of the Regions: "A European Strategy for Marine and Maritime Research" COM(2008) 534

Council decision concerning Cooperation Specific Programme

European Parliament and the Council decision of 18 December 2006 concerning the FP7 EC (2007-2013)

Regulation laying down the rules for the participation to FP7 EC (2007-2013)

arrangements for each call are described in the relevant Guide for Applicants)

All files have been treated uniformly and compressed to facilitate the access to the individual documents and to optimise the speed of transfer. To access the files, you will need a file compression utility capable of opening the 'zip' format.

All documents as a zip file (EN only). Caution: Download time will vary depending on your internet connection, this type of zip file can exceed 40 Mb.

#### Electronic Proposal Submission

To access the Electronic Submission Service of the call, please select the funding scheme or objective corresponding to the work programme topic that is most relevant to your proposal from the list below. You will then be linked to the correct entry point. To access existing draft proposals for this call, please login to the Participant Portal and select the "My Proposals" tab.

Rules for submission of proposals and the related evaluation, selection and award procedures (the specific

Download the user guide of the Participant Portal Submission Service.

Available activity topics:

Biosensors for real time monitoring of biohazard and man made chemical c...[OCEAN 2013.1] V Go Biosensors for real time monitoring of biohazard and man made chemical c...[OCEAN 2013.1] Innovative multifunctional sensors for in-situ monitoring of marine envi...[OCEAN 2013.2]

Innovative antifouling materials for maritime applications[OCEAN 2013.3]

- Innovative transport and deployment systems for the offshore wind energy...[OCEAN 2013] 02\_Innovative multifunctional sens - View or contact relevant National Contact Points for further help.
- Contact mailbox: RTD-OCEAN-CALL@ec.europa.eu

maritime activities [OCEAN 2013.2

Select language

English

English

English

English

Engli

Engli

monitoring of marine environmen

## Step 3

#### Create a Draft Proposal



#### **Configuration OK**

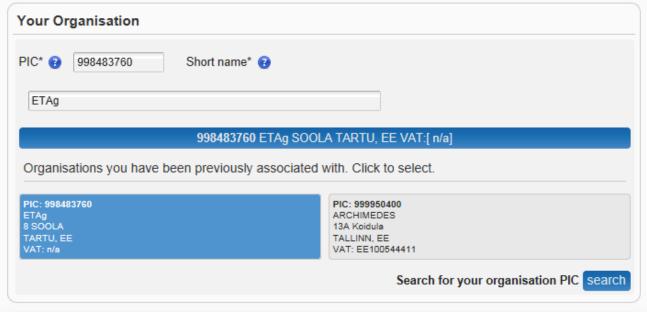


You're using Explorer 9 on Windows. Adobe Reader (version 9 or above) is installed..

For more information, go to the help page, or read the Starter Manual.

#### Create a Draft Proposal

Please enter the following information to create a draft proposal. Please note that fields marked with a star (\*) are **mandatory**.



#### Your Proposal

Please choose an acronym for your proposal. It will appear also in the "General Information" section of the submission form Part A and can also be updated there.

Acronym*	TEST	Please restrict acronym to latin characters only
Short Summary (max. 2000 characters)* Character count: 23	this is a test proposal	A
Activity Topic (primary)*	Activity Topic (seconda	ry)
Innovative antifouling mate	Please select	

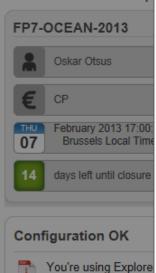
FUNDING SCHEME CREATE DRAFT PARTIES EDIT PROPOSAL

## Step 3

LOGIN

#### Create a Draft Proposal

Create a Draft Proposal



You're using Explore Windows. Adobe Re (version 9 or above) installed.

For more information the help page, or rea

#### Submission and Evaluation of Proposals Assent Disclaimer

By pressing the following button, you accept the terms and conditions of usage of this site and more specifically:

#### Proposal pre-registration data

- 1. Information used for the pre-registration and creation of a draft proposal: Your Organisation, Acronym, Short Summary, Topics/Panels/Codes etc. (Step3) and the list of participants (Step4) can be used by the services in charge for the planning of evaluations.
- Short Summary describes briefly the purpose of the proposal with a maximum of 2,000
  characters. Entering at least keywords will help the services in the planning of the evaluations.
  Coordinators may choose to enter 'xxx' at this stage should they prefer not disclosing any data.

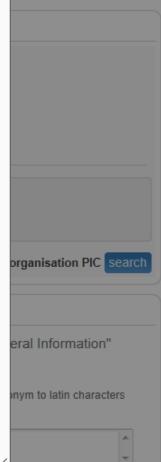
#### Part B

- 3. File format: For the proposal content (part B) you must use exclusively PDF ("portable document format", compatible with Adobe Acrobat version 5 or higher, with embedded fonts). Most calls allow only one PDF file comprising the complete technical annex (part B) to be uploaded. You should check the call text and Guide for Applicants for possible exceptions.
- 4. Time constraints: Preparation and uploading of the PDF formatted part B may take some time. You should ensure that this has been completed in time, well before the call closure deadline.

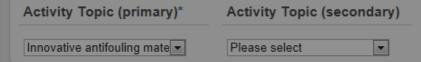
#### Submission

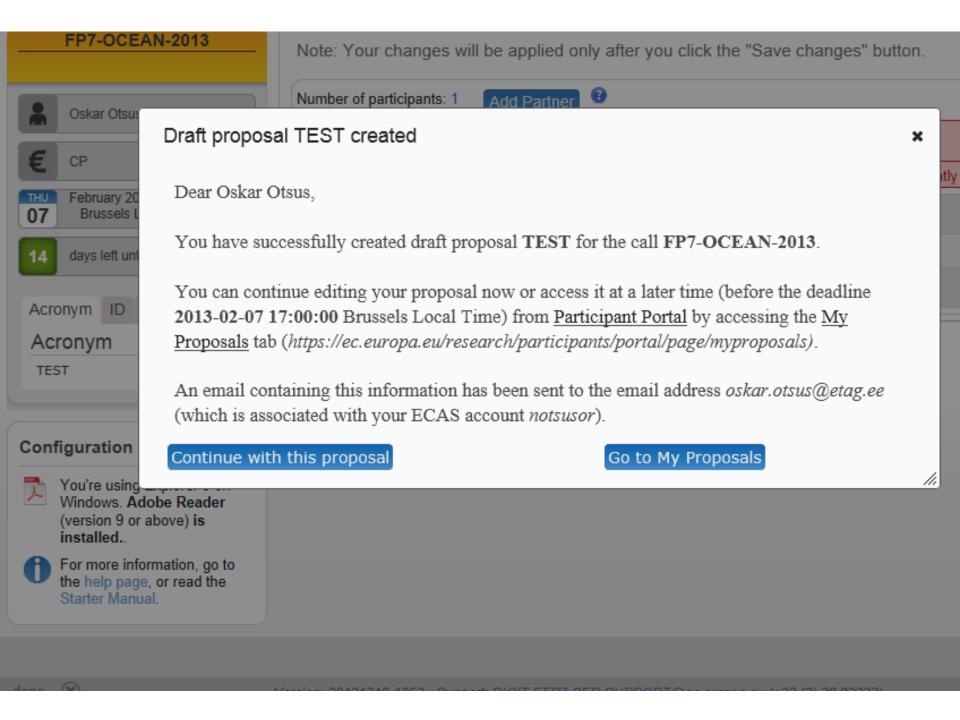
5. In order to be made available for evaluation, proposals must be submitted prior to the call closure deadline. Likewise, modifications to proposals or uploaded attachments are also required to be submitted prior to the call closure deadline or they will not be taken into account. Proposals may be submitted or withdrawn at any time prior to the call closure deadline. There is only ever one version of a submitted proposal, as submission over-writes the previous version.

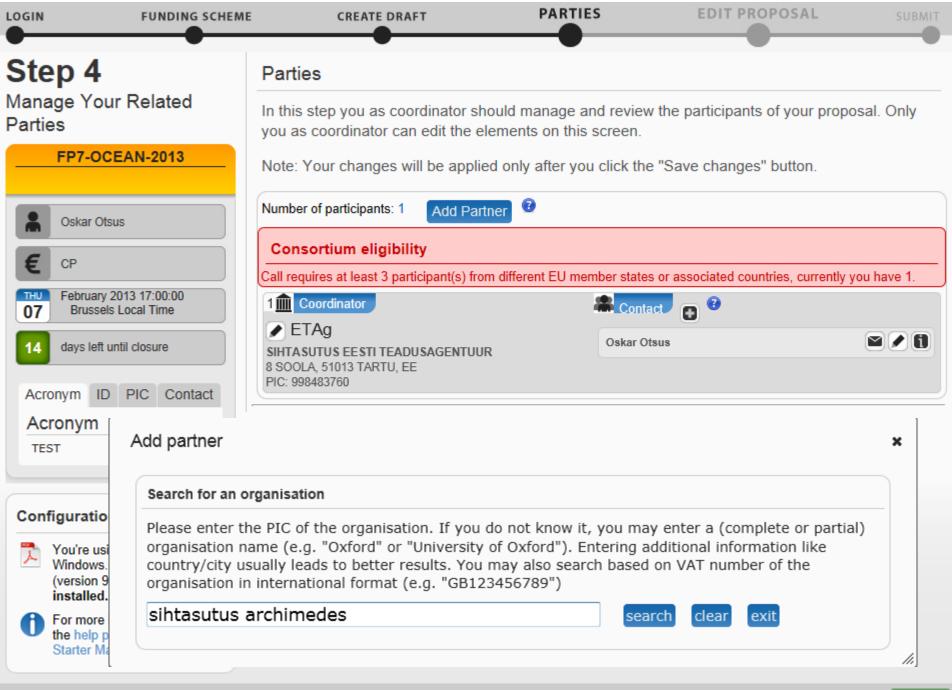
There is only ever	
version.	
accept decline	

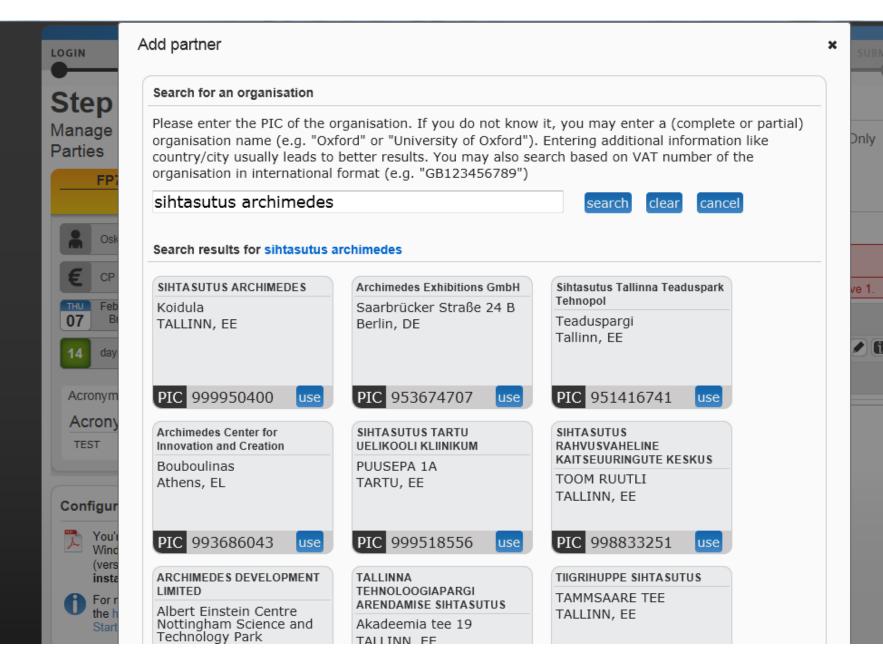


that fields marked









LOGIN





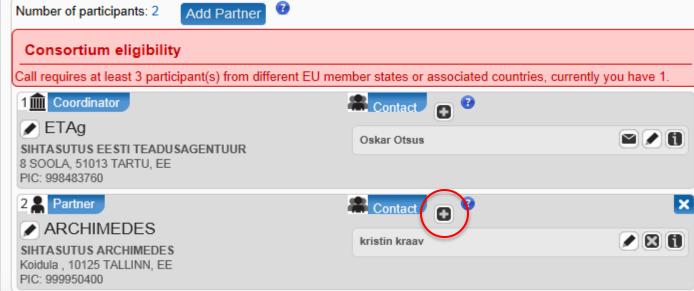
Starter Manual.

#### **Parties**

In this step you as coordinator should manage and review the participants of your proposal. Only you as coordinator can edit the elements on this screen.

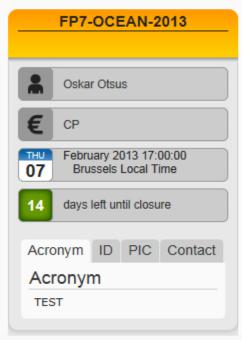
**PARTIES** 

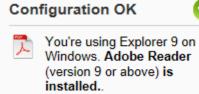
Note: Your changes will be applied only after you click the "Save changes" button.



LOGIN

Manage Your Related **Parties** 







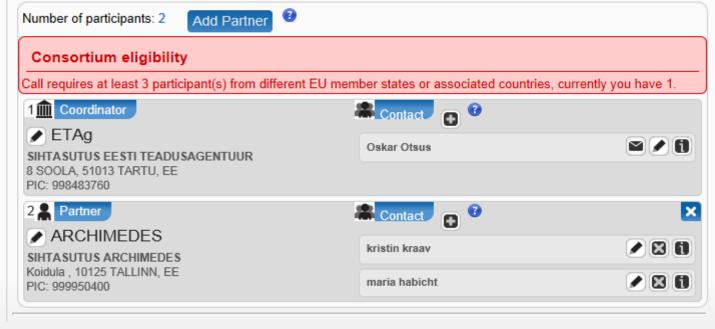
#### **Parties**

**FUNDING SCHEME** 

In this step you as coordinator should manage and review the participants of your proposal. Only you as coordinator can edit the elements on this screen.

PARTIES

Note: Your changes will be applied only after you click the "Save changes" button.



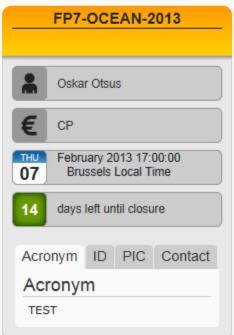
Save Changes





## Step 5

Edit Proposal







You're using Explorer 9 on Windows. Adobe Reader (version 9 or above) is installed..

For more information, go to the help page, or read the Starter Manual.

#### Edit Proposals' Forms

In this step you can edit the administrative forms and upload the proposal itself. @

WARNING: This proposal contains changes that have not yet been submitted...

#### Administrative Forms

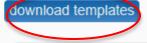
Edit will open the forms in Adobe Reader.



Browse..

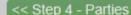
#### Part B and Annexes

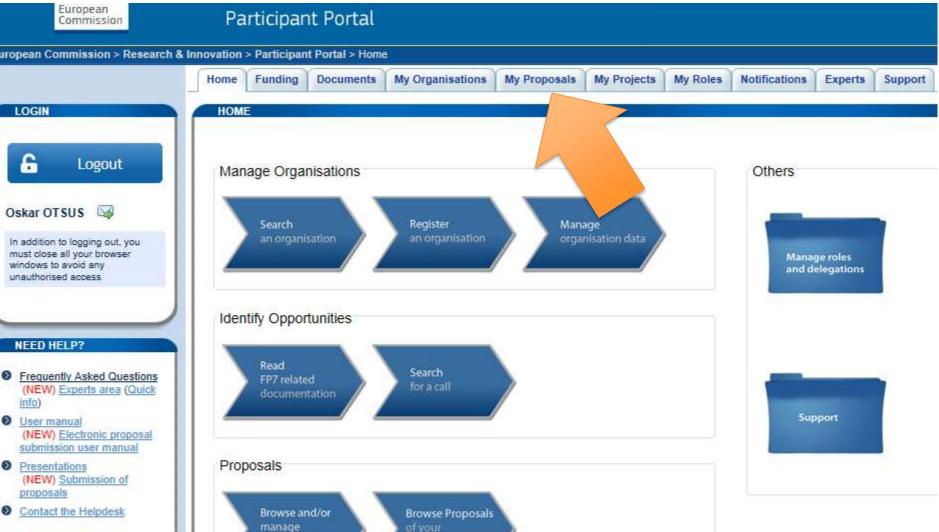
In this section you may upload the proposal text itself (in PDF format only) and any other requested attachments. 3



Part B







- Contact the Helpdesk

#### WHAT'S NEW

#### (12/2012)Support for electronic-only

Participant Portal V3.5

- submission of Financial Statements (when applicable)
- Role management:
  - new role of FSIGN /Einannial Statement

proposals

Browse and/or

Negotiations

#### Participant Portal

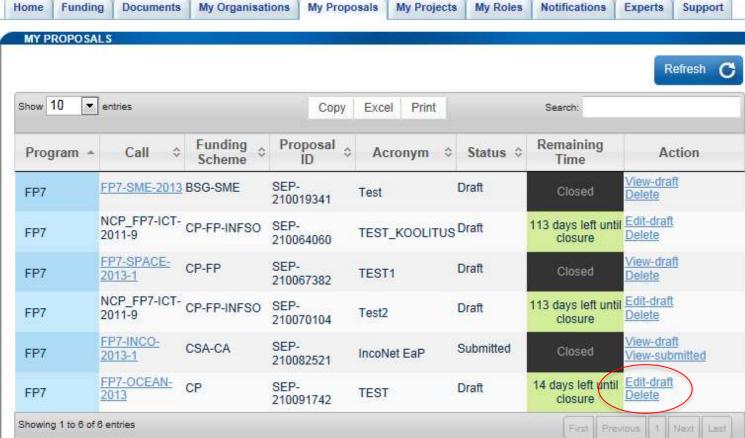
#### European Commission > Research & Innovation > Participant Portal > My Proposals



#### **NEED HELP?**

unauthorised access

- Frequently Asked Questions (NEW) Experts area (Quick info)
- User manual
   (NEW) Electronic proposal
   submission user manual
- Presentations
   (NEW) Submission of proposals
- Ocontact the Helpdesk



#### WHAT'S NEW

Participant Portal V3.5 (12/2012)

- Support for electronic-only submission of Financial Statements (when applicable)
- Role management



## What did we talk about?

- **❖** Timeline from idea to project
- Building your team
- Preparing the application
- Putting together the budget
- Participants portal
- Submitting the application

#### Oskar Otsus

Estonian Research Council tel: +372 7 317 350

e-mail: oskar.otsus@etag.ee