



H2020 Trainings Proposal

Martel Innovate

*Switzerland
2017*

Assessing your Needs



Premise: we customize our trainings based on your specific needs.

- **Subjects:** you can choose among our modules and/or we can add specific contents based on your needs (e.g. NGI, 5G, FIWARE etc)
- **Target:** HUB/Accelerators beneficiaries, Researchers, Public Administrations and partners, SMEs, Universities and Industry
- **Timeline:** We offer flexibility in defining the dates which best accommodate your teams' schedule
- **Location:** We offer in-house trainings or we can host your trainings at our offices in Zurich, Switzerland

Martel's Proposal



Based on our first-hand and consolidated experience, the feedback gathered from our customers and partners and the lessons-learned so far, we have defined the content of our courses to deliver the most relevant and precise information to help organisations in **delivering winning proposals** and managing their projects efficiently.

We suggest **max 10-12 participants** for each workshop, in order to allow interaction and active Q&A sessions

Training material in an electronic version will be provided to all participants by Martel

*Martel Innovate: 10 ongoing H2020 projects
and 6 new ones starting in January 2017!*

The leader Swiss company
in European R&D Innovation management

Martel Overview

A Swiss-based SME with more than 20 years experience in R&D&I management and implementation, working with and for top-notch players in Europe and worldwide (US, Brazil, Mexico, China, etc.)

Our Management Team



Martin Potts
Founder and Director



Dr. Monique Calisti
Partner and Director



Dr. Federico M. Facca
Head of Martel R&D

Martel's Organisation



- Strategy and Leadership
- Business Development
- Partnerships and Joint Ventures



- R&D&I projects management
- R&D funding seeking
- H2020 proposals preparation
- Technical & strategic consulting
- Training and tutorials



- R&D expertise and services
 - Cloud Computing, IoT, 5G, ...
 - Open Source solutions
 - Technology scouting
 - Innovation roadmapping



- Dissemination & Communication
 - Social media
 - Promotion material and activities
 - Events organisation and management
 - Networking

→ Training courses on various topics

- Introduction to H2020, Proposal Development, Administration and Finance, Project Coordination, Dissemination and Communication, Impact Creation

→ Consulting services

- Support to proposals' preparation, screening, and submission, post-evaluation procedures in case of acceptance (GAs, CAs, Ethical issues...)



Our strategic approach

Flexibly combining Consulting, Lab & Media skills and expertise

- Adapt the recipe to the specific business case
- Strongly skilled individuals – both ICT & Business
- Recognised innovation leaders with partnerships with major innovators in Europe and beyond



Current EU Project involvement



Collaborative EU Research & Innovation

- 18 Framework Programme 7 projects, 3 terminated recently
- 9 ongoing Horizon 2020 projects
 - **Involved from the 1st H2020 Call with winning proposals!**
- 6 new projects just started in Q1 2017



Martel's main role:

Project Coordinator / Support to coordinator, Leader of Dissemination and Communication activities, Key R&D Contributor



Covered topics:

Next Generation Internet, Smart Cities, IoT, Cloud Computing, Media & Content Management, Wireless, 5G and Satellite Communication, FIWARE, Large-scale Experimentation, International Cooperation, Collective Awareness Platforms for Sustainability and Social Innovation





Martel Academy: Training Modules



Horizon 2020 Program: a snapshot



1. The Opportunity:

- The 1st Call for Proposals under Horizon 2020, the EU's new Framework Program for Research and Innovation, were launched in December 2013. The program spans across seven years (2014-2020) with a budget of €77 billion to fund research and innovation projects across Europe.
- Swiss organisations are entitled to participate to H2020 both as partners and coordinators of projects – funded by SERI until now, but this will likely change by the end of February 2017

2. The Challenge:

- Based on recent numbers communicated by the European Commission, in 2015 a total of 15 billion euros have been allocated for funding research and innovation projects.
- Whilst 42'535 eligible proposals were submitted, only a total of 4,565 were retained for funding. This shows that access to these funds is very competitive. In 2015, the overall success rate in terms of number of eligible proposal was only 10.7%

*For comparison, Martel's success rate in 2016
is higher than 50%!!!*

Training participants' benefits

- Being able to **identify and understand** the relevant funding schemes, calls for proposals and relevant program documents
- Understand the essentials of **turning innovative project ideas into competitive Horizon 2020 proposals** – beyond just meeting the requirements
- Understand the evaluation process, rating criteria and mechanisms to **better conceive and write your proposal**
- **Network** and exchange experiences with master trainers with long and sound experience of European funding and projects
- Get **professional support** to elaborate on the dissemination, communication and exploitation activities at proposal preparation and project run time

Martel Academy: 9 customisable modules



Within the context of H2020 proposal development and project management, we offer multiple modules which can be combined based on each partner's specific needs and whose contents can be customised, based on the context, course participants' expertise and areas of interest

- 1. Introduction to H2020**
- 2. Proposal Development**
- 3. Administration and Finance**
- 4. Project Coordination**
- 5. Impact Creation**
- 6. Key Performance Indicators and Risks Management**
- 7. Dissemination and Communication**
- 8. H2020 SME Instruments**
- 9. EC Open Calls and Cascade Funding**

Modules can be combined in a flexible way

1. Introduction to H2020

Introduction to H2020 is a half-day module which provides a comprehensive background on the H2020 Program. It is a foundation module, intended for participants new to the H2020 program.

- What is H2020
- H2020 glossary
- Typical consortia composition
- What areas are funded
- RIAs, IAs, CSAs
- Typical levels of funding
- Open and upcoming Calls
- Useful events to attend
- Building consortia
- Checks and balances:
 - Monitoring the achievements (project reviews)
 - Financial audits (general information about eligible costs)



H O R I Z  N 2 0 2 0

2. Proposal Development

Writing a winning proposal is a one-day module which provides a detailed and hands-on learning opportunity for participants who need to master the fundamentals of the H2020 proposal submission process. It is aimed at participants with a basic H2020 knowledge.

- **Identifying appropriate Calls**
- **Building consortia**
- **Building the proposal:**
 - Section 1
 - Section 2
 - Section 3
 - Section 4
 - Section 5
- **Data Management Plan**
- **Open Research Data Pilot**
- **Ethics**
- **Budget calculation**
- **What's new? Financial instruments**
 - SME instruments
 - Public-private partnerships
 - Public-public partnerships
- **Additional activities, if coordinator:**
 - Data to collect
 - Entering partner data into ECAS
 - Entering budget into ECAS
 - Validation check
 - Submitting
 - Finding your way around SyGMA

3. Administration and Finance

Administration & Finance is half-day module which provides a detailed and hands-on learning opportunity for participants who need to master the administration and finance procedures within H2020 projects.

- **The Participant Portal**
- **User Registration in ECAS**
- **Organisation registration in ECAS**
- **Partner roles:**
 - Appointment of LEAR
 - Appointment of PLSIGN
 - Appointment of FSIGN
 - Finding your way around SyGMA (when a proposal has been accepted)
- **Signing documents in SyGMA (DoH, Accession)**
- **Consortium Agreement**
- **Responsibilities within the General Assembly**
- **Cost Claims**
- **Independent financial audit certificates**
- **EC financial audits**

4. Project Coordination

Project Coordination is a one-day module which guides the participants through the whole coordination process, starting from the project's submission through the whole project's life.

→ **Activities during proposal preparation:**

- Data to collect
- Entering partner data into ECAS
- Entering budget into ECAS
- Validation check
- Submitting

→ **Activities after acceptance, but before the project starts:**

- Signing documents in SyGMA (DoH, Accession, GA)
- Getting signatures for documents in SyGMA from partners (DoH, Accession)
- Consortium Agreement

→ **Activities during the project:**

- Payments (and keeping records)
- Leading the main meetings and telcos (agenda, chairing, minutes)
- Quality Assurance
- Submitting deliverables
- Contract Amendments
- PPRs (4 parts)
- Leading the project reviews
- Final report

→ **Activities after the project's official termination:**

- Handling final payments (over-/under-spending)

5. Dissemination & Communication

Dissemination & Communication is a one-day module which guides the participants through the Dissemination and Communication activities of H2020 projects, including participant involvement in real case scenarios.

→ **Successful Dissemination & Communication in H2020**

- Dissemination & Communication objectives, target stakeholders, plan, activities and tools
- Tailoring of plans to specific impact creation needs
- Community building activities and support tools
- Events organisation
- Social media at the service of dissemination & communication

→ **Exploitation Routes & IP Strategies in H2020**

- What are the main IPR issues and exploitation routes
- Impact on value capture in the market and business development opportunities
- IP management:
 - Definitions and guidelines for non-legal experts
 - Open access, Data management, etc.



Training Contents – Abstract

To get started with your proposal

Focus on the excellence (RIA) and business opportunity (IA) and not too much on the project to start with

→ **It's all about excellence and impact creation!**

Need to be convincing when describing your consortium - you have to explain why you will succeed and not your competitor/s

→ **Credibility and commitment!**

Provide enough information on competing approaches, state-of-the arts, existing solutions

→ **In-depth understanding of the R&D&I context!**

Be ambitious and aim at excellence, planning to develop a product, a service or a technology that doesn't exist on the market

→ **Visionary and pioneering!**

Propose an idea with a good concept for its exploitation and/or commercialisation

Important tips for proposal-writing

The proposal shall be written to convince evaluators to invest in your R&D / business plans: **they must buy into your ideas and plans**

2-4 evaluators will assess your proposal from different angles, e.g., research potential, technology, market knowledge, commercialisation plan, financial viability/relevance. Each of them will look at 3 criteria:

- **Impact**
- **Excellence**
- **Implementation**

The proposal shall be well balanced and cover all the aspects for each evaluation criteria... **this is key to succeed!**

Starting from the most important...

Impact

- **Demonstrate** that your project will generate revenues and create jobs
- **Explain** the market conditions and the evolution of the competition
- Provide concrete and realistic figures on the **market size**, the market share, the income it will generate
- Show at least 3 years of **projection of sales** volume, turnover and number of jobs created
- Describe your **commercialisation** plan
- A key aspect is that you have to demonstrate that your project has a **European or international dimension**
- The protection of **IPR** is also very important and must be explained

Excellence

- **Convince the evaluators** that your innovation is excellent, that your product, process or service is disruptive, that it has the potential to change the dynamic of the market and possibly to address a societal challenge
- Show the **added value** of your idea and explain why it is viable and better than existing solutions
- Demonstrate that you **understand the risks**

Implementation

- **Convince the evaluators** that you can make it. As well as describing technical competence, you'll also need to provide information on commercial competence. Evaluators will assess the credibility of your team and of your work plan.
- Make sure you clearly describe **how you will organise your team** and, if you intend to use external partners to bring competences that you don't have in your company, explain what they will do and what they will bring.
- **Planning** is important as well: your project should fit into a realistic timeframe

A row of large satellite dishes in a field under a blue sky with clouds. The dishes are arranged in a line, with the largest one on the left and smaller ones following. The sky is a deep blue with scattered white clouds. The ground is a flat, brownish field.

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Thank you for your attention

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