Horizontal activities – Open Science, Data Management, Dissemination of Results incl. Communication
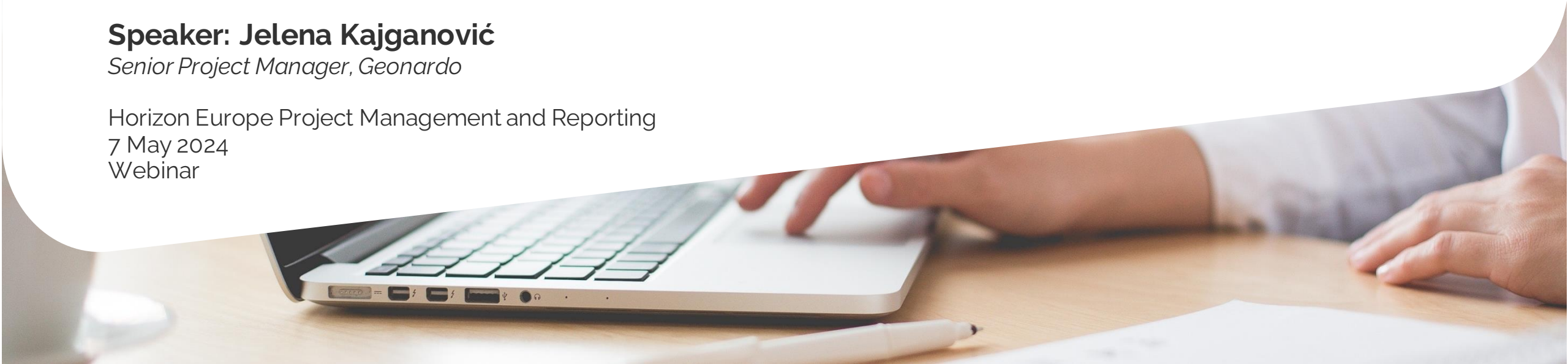
Speaker: Jelena Kajganović
Senior Project Manager, Geonardo

Horizon Europe Project Management and Reporting
7 May 2024
Webinar

Content

- Dissemination & Communication

- Open Science & Data Management

- EC Tools

1

Dissemination & Communication

Dissemination and Communication

Strategic level

Section 2.2 – Measures to maximise impact Dissemination, exploitation and communication
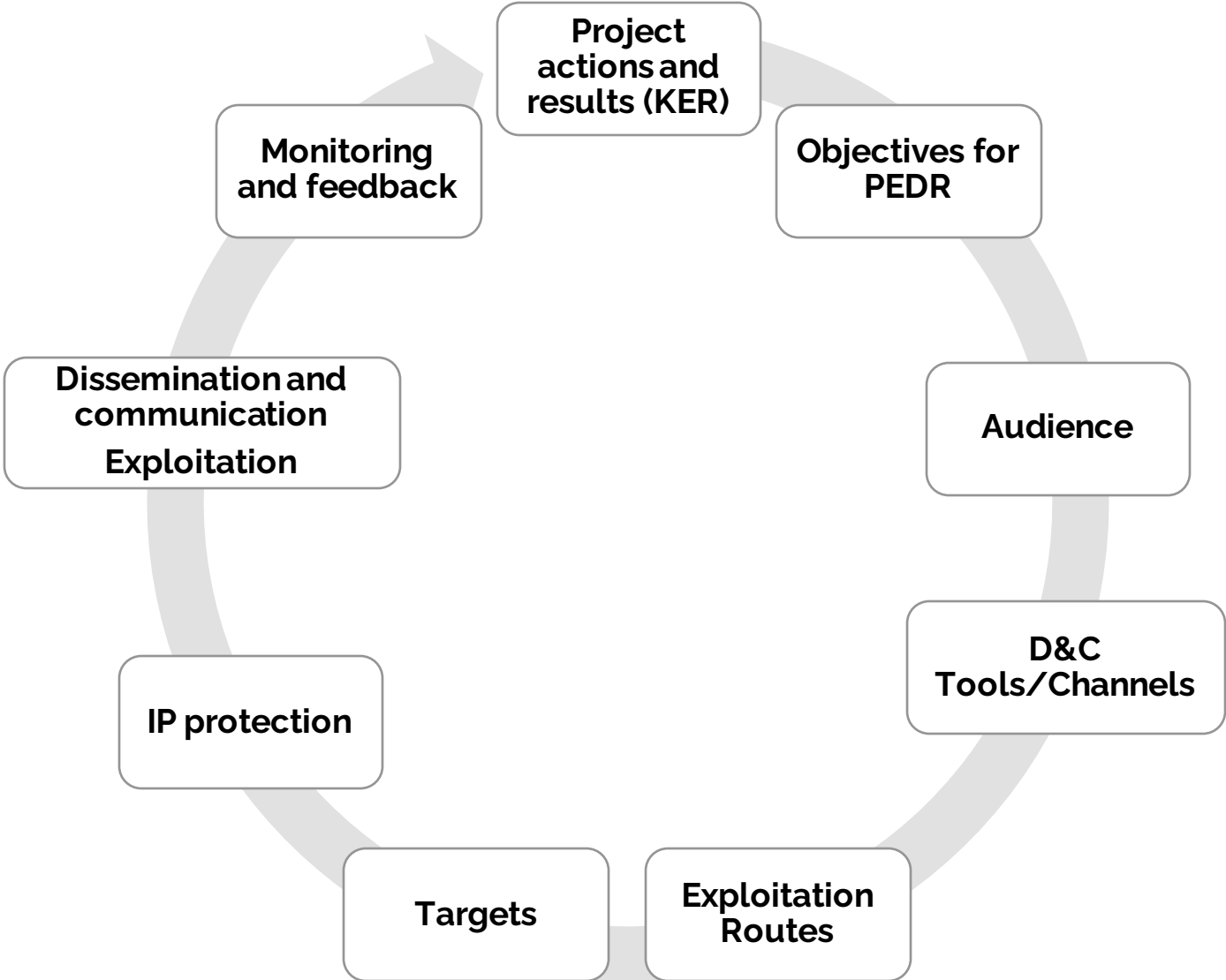
[e.g. 5 pages]

Operational level (will be binding!)

Work Package on Dissemination and Communication (and Exploitation)

- Describe the planned measures to maximise the impact of your project by providing a first version of your 'plan for the dissemination and exploitation including communication activities'. Describe the dissemination, exploitation and communication measures that are planned, and the target group(s) addressed (e.g. scientific community, end users, financial actors, public at large).

  ⚠ Please remember that this plan is an admissibility condition, unless the work programme topic explicitly states otherwise. In case your proposal is selected for funding, a more detailed 'plan for dissemination and exploitation including communication activities' will need to be provided as a mandatory project deliverable within 6 months after signature date. This plan shall be periodically updated in alignment with the project's progress.

Strategic level
Drafting your PEDR

- Project actions and results (KER)
- Objectives for PEDR
- Audience
- D&C Tools/Channels
- Exploitation Routes
- Targets
- IP protection
- Dissemination and communication Exploitation
- Monitoring and feedback

Plan for Exploitation and Dissemination of Results
including communication

= strategic document for the beneficiaries helping them to establish the bases for their intellectual property strategy, dissemination and exploitation activities.

- The PEDR **follows the evolution of the project** from the proposal until the submission of the final project report.

- Draft version in the proposal

- Initial version (deliverable at the beginning of the project):
  - Planned measures to maximize the impact of project results
  - Target groups (e.g. scientific community, end users, financial actors, general public) and proposed channels
  - Communication measures for promoting the project and its findings throughout the full lifespan of the project
  - Policy feedback measures to contribute to policy making
  - But also: a comprehensive and feasible strategy for the management of the intellectual property and a convincing justification that exploitation is still in the Union's interest, if it is expected primarily in non-associated third countries

Updated or confirmed Plan for the Exploitation and Dissemination of Results in the periodic report or as agreed in the GAP.

Plan for Exploitation and Dissemination of Results
Table of Content

- **Executive Summary**
  - Project in short
  - Scope of the Dissemination and Communication Plan

- **Dissemination Plan**
  - Dissemination strategy
  - Target audience
  - Stakeholders and Networks
  - Open Science practices
  - Data Management

- **Communication Plan**
  - Tools and channels
  - Dissemination material online and offline
  - Messages
  - Website
  - Partner's websites
  - Social Media
  - Press and Media
  - Intermediaries, influencers
  - Utilizing EC channels
  - Utilizing national platforms

- Visibility of EU funding
- Networking and collaboration
- Event organisation and participation

- **Visual Identity**

- **Implementation Plan**
  - Timeline
  - Budget
  - KPIs
  - Continuity and Document Maintenance
  - Distribution of Tasks
  - Safety measures

- **Reporting and Monitoring**
  - Targets and timeline
  - Reporting table instructions

- **Innovation management**
  - IPR arrangements and Exploitation routes – individual/joint
  - Potential geographical coverage and economic size of the target markets

- Potential users, main competitors and competitive advantages
- Analyses on the state of the art
- Analyses on the intellectual property that is needed and will be brought to the project
- Facts and figures on the planned exploitable results and their areas of application and intellectual property protection
- Description of the exploitation roadmap and business model

- **Annexes**

- **Guidelines for partners**
  - Communication Toolkit
  - Reporting table for partners
  - Preliminary list of events
  - Newsletter and press release schedule
  - List of relevant projects and initiatives
  - List of supporting organisations (LoI)
  - Dissemination and communication contact points at partners

Monitoring and reporting tips

- Partners report on dissemination activities they conducted

- Partners can provide suggestions for future events to attend in the next 3-6 months

- Partners collect any mentions of the project in the media

- Scientific publications are listed in a separate tab

- The final tab always includes target monitoring

- Regularly check the progress towards the targets (ideally, on a 3-6-monthly basis)

	Partner organisation	Author/presenter (from the partner)	Others involved (from the consortium)	articles published in the popular press
2	SDU			articles published in the popular press
3	UU			blog post
4	RWTH			Business cards
5	EM			conference participation
6	JR			Conference paper
7	SWU			contact building
8	PU			cooperation and exchange of information
9	VU			direct emails
10	VMU			discussion
11	UNL			exhibitions
12	UNIRI			interview
13				launch of the website/wiki
14				leaflet distribution/ other dissemination materials
15				link on partners´ websites
16				mailing lists
17				media briefings
18				other
19				poster
20				presentation
21				press releases
22				press/media
23				scientific publications
24				RSS feed set up

How to fill in the table | **Dissemination activities** | Web and Press Details | Proposed activities | Publications | Exploi ...

**Why is this important?**

- EC reporting… and… Reviews

2 Open Science & Data Management

Open science

= approach based on cooperative work and systematic sharing of knowledge and tools **as early and widely as possible**

- **Obligations from GA Art. 17 + Annex 5**
  - Open access to scientific publications
  - Open access to your research data + Data Management Plan
  - Trusted repositories, (Creative Commons) licenses

- **Open science practices**
  - Open access
  - Early and open sharing (via pre-registration, registered reports, preprints)
  - Open peer-review
  - Reproducibility of results
  - Citizen, civil society and end-user engagement (co-design, co-creation, co-assessment)
  - Research data management

💡Make sure that the partner(s) in charge are properly implementing/overseeing and the info is collected (can be in the internal reporting).
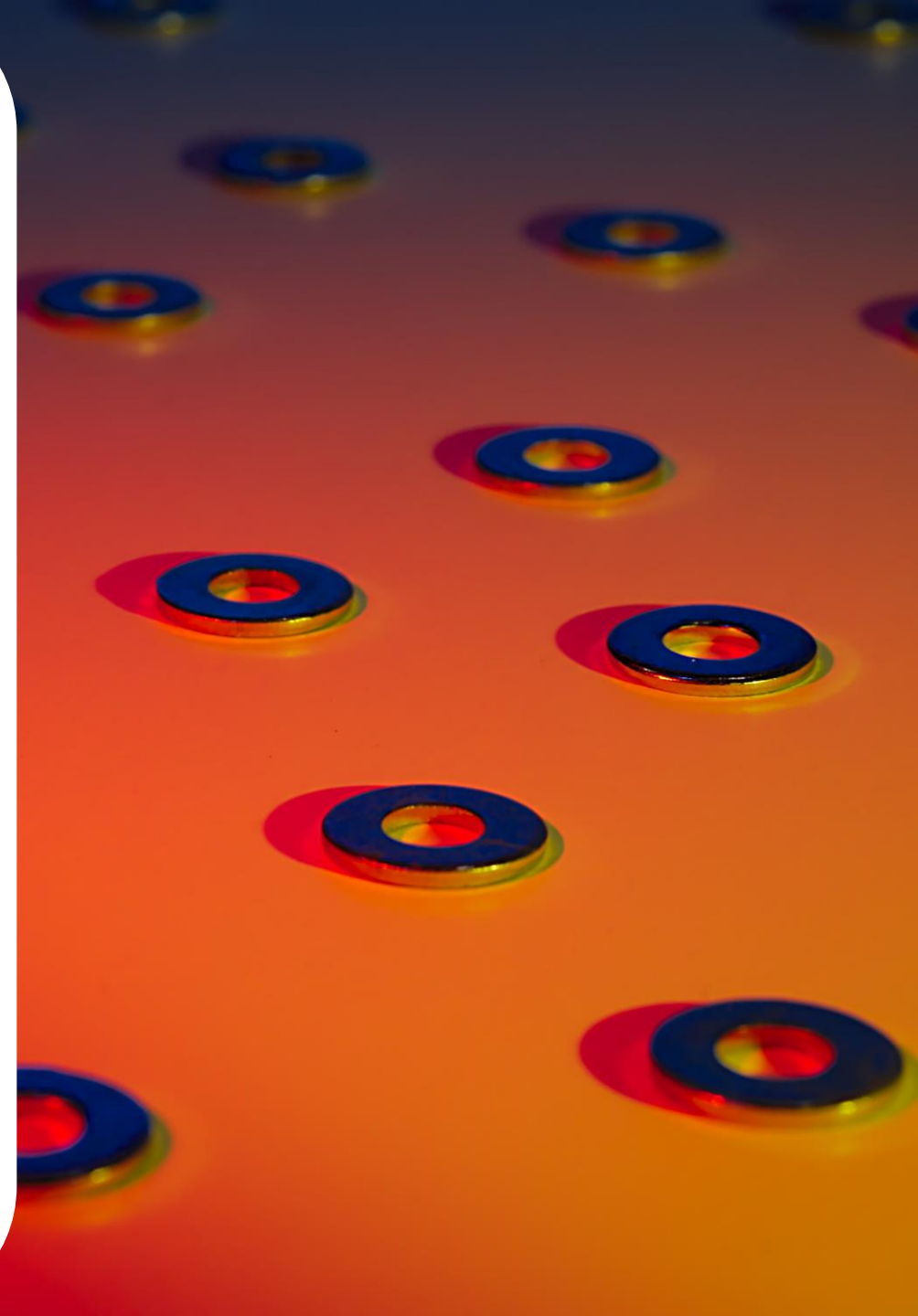
Data management

= the **process** within the research lifecycle that includes the data collection or acquisition, organisation, curation, storage, (long-term) preservation, security, quality assurance, allocation of persistent identifiers (PIDs), provision of metadata in line with disciplinary requirements, licencing, and rules and procedures for sharing of data.

Data Management Plan (DMP)

= your key to good data management

- Describes the data management life cycle

- Deliverable – 1st version by M6

- Living document (!) => deliverable iterations

💡 Make sure the leading partner has a system and gathers all needed information from partners to draw the DMP.
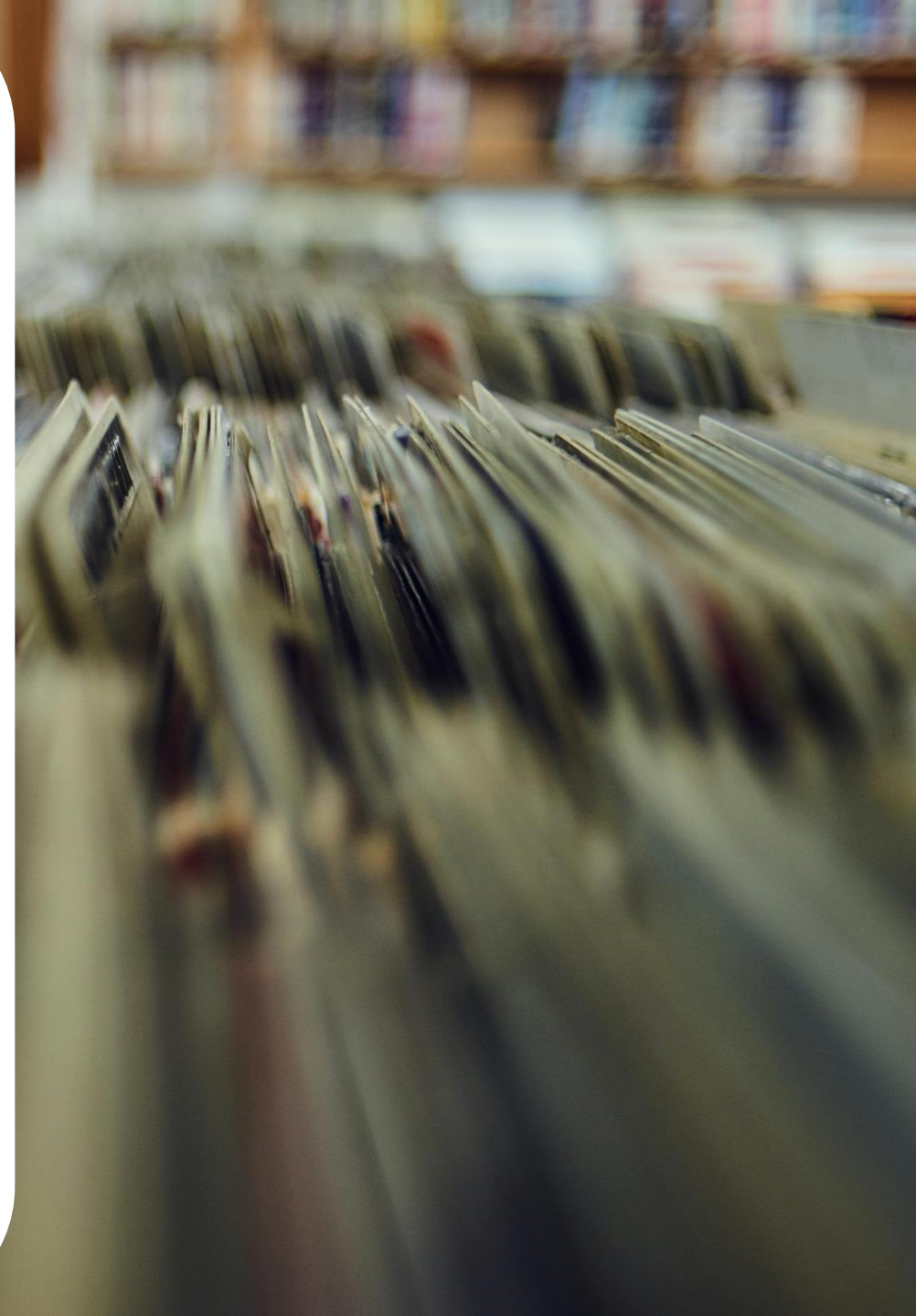
Data Management Plan
What to include?

- **Data set description:** what kind of data is your project generating or reusing? Estimate the size of the data set

- **Standards and metadata:** how do you structure your data and what protocols are you using?

- **Name and persistent identifier for data sets:** unique and persistent identifier and a stable link to directly access the data

- **Curation and preservation methodology:** how will you ensure the integrity of the data sets and for how much time? How will it be preserved and kept?

- **Data sharing methodology:** how can the data sets be accessed? Terms of use and license

- **Research output management other than data and publications**

- **Related costs and personnel:** data collection, documentation, storage, preservation, availability and reuse, person/team in charge
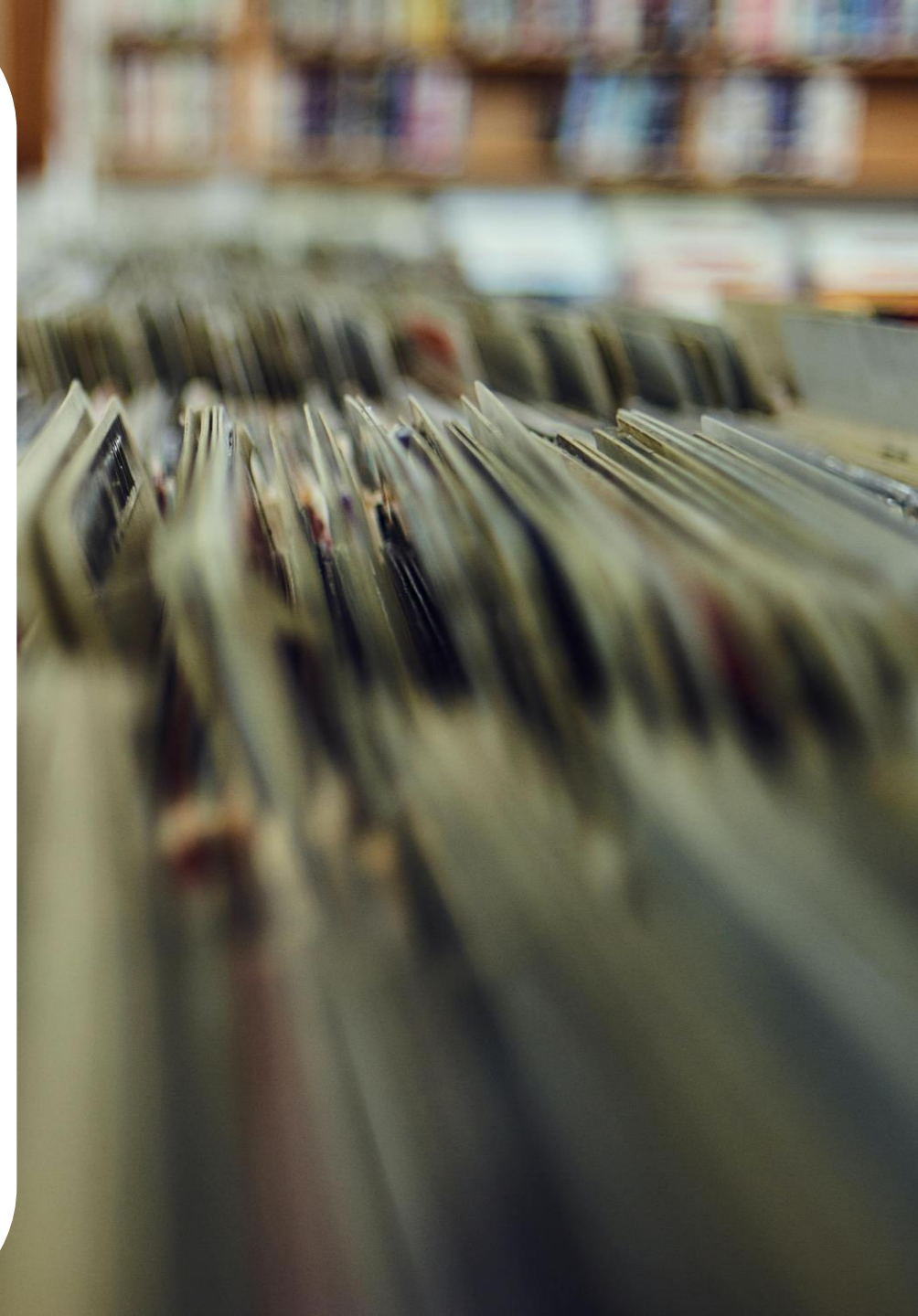
3 EC Tools

Horizon Results Booster
D&E – Business planning – Go to Market

- The Horizon Results Booster a European Commission initiative which aims to maximize the impact of research projects funded by FP7, Horizon 2020 and Horizon Europe.

- General eligibility: **all EU-funded projects are eligible:** Ongoing or completed; Directly funded by FP7, H2020, HE; Indirectly funded by FP7, H2020, HE (e.g., by KICs, art. 185, etc.)

- Three main services are provided:
  - Service 1 - **Portfolio Dissemination and Exploitation Strategy** - develop a portfolio of results and design an effective dissemination and exploitation strategy.
  - Service 2 - **Business Plan Development** - develop an effective business plan and find out how to secure additional funding for implementation of the plan.
  - Service 3 - **Go to Market** - get your research ready for commercialization!

- HRB services can be requested at any given moment by eligible projects. The sooner the better!

- During the application you will be asked to specify the indicative quarter when you prefer the services starting to be delivered (could be up to 1 year after the submission of the application).

- It is preferable to start the HRB service delivery once there is a clear idea of the results of the project. We suggest for example PDES-A and PDES-C (entry point services) to be started around M6.

https://www.horizonresultsbooster.eu/

HORIZON
RESULTS
BOOSTER

Horizon Results Booster
Service eligibility and requirements

Service 1 – Portfolio Dissemination and Exploitation Strategy (PDES)

Module A: *Identification and creation of the portfolio of R&I project results*	Application is open to **both individual projects and project groups** (PGs).
Module B: *Portfolio Dissemination Plan (design and execution)*	Application is open **only** to **PGs**. PGs that applied also to PDES-A can be enlarged before starting PDES-B. A portfolio of results has to be provided at the application stage.

Services flow

Service 1 – Portfolio Dissemination and Exploitation Strategy (PDES)

Module C: *Assisting projects to improve their existing exploitation strategy*	Application is open only to **single projects**. Upload of exploitation plan is optional. **Focus is on 3 Key Exploitable Results (KERs)**.

Service 2 - Business Plan Development (BPD)

Application is open only to **single projects**.
Focus is only on 1 KER.
An Exploitation Plan should be available/Draft Business Plan.

Service 3 - Go-To-Market Support (G2M)

6 different support typologies are available.
Some of them are only for individual projects.
Not all support typologies can be selected (max # of EWDs per project).
A (draft) Business Plan should be available. **Focus is only on 1 KER.**

Horizon Results Platform
Promote the exploitation of your results

European Open Science Cloud (EOSC)

= open trusted virtual cloud to enable researcher to store, share, process, analyze, and reuse research data, publications, and software across disciplines and borders.

- Use cases on [EOSC in Practice](#)

- EOSC community and stakeholders on [events](#) and [news](#) sections

- [EOSC-Hub](#)

- [Catalogue](#) & [Marketplace](#) for services and resources for researchers

- [Training](#)

💡 Work programmes may require the use of trusted repositories federated in EOSC for depositing research data
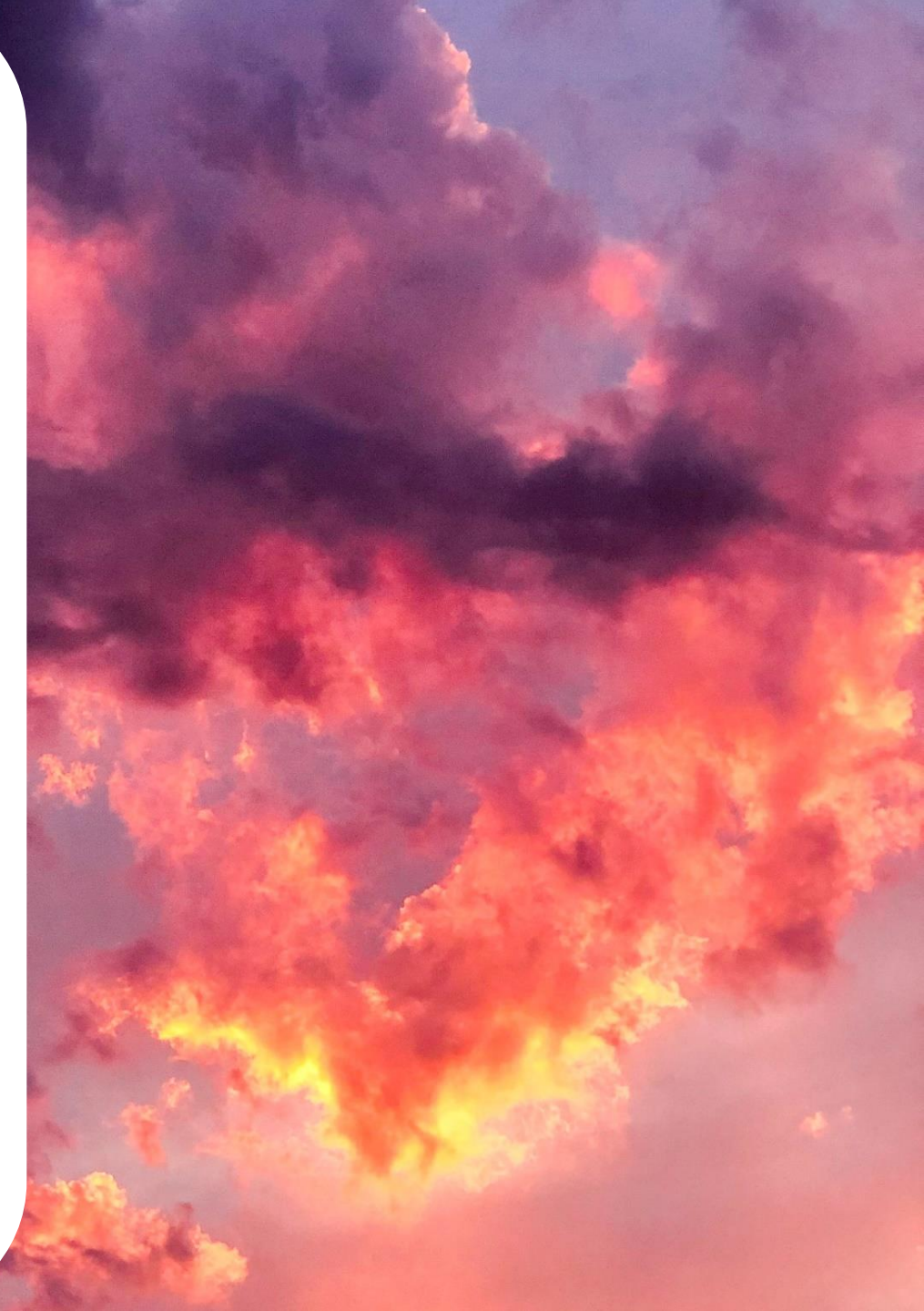
OpenAIRE

= network of dedicated Open Science experts + training

= infrastructure harvesting research output from connected data providers

Services and perks:

- Integrated scientific information (links publications, project info, datasets in one place)

- Training sessions on Open Access/Open Science

- Zenodo = all-purpose open research repository (publications, datasets, code, posters, presentations…)

- Open Science helpdesk

- 34 National Open Access Desks (NOADs)
    - UNIT in Norway

💡 All OpenAIRE services can be used for free, however some of them may require logging in.

Open Research Europe

= open access publishing platform for the publication of research coming from H2020 and HE funding

Some characteristics:

- Helps beneficiaries comply with the open access terms of their funding

- Publishing venue to share results and insights rapidly

- Facilitate open, constructive research

- Author-driven model = authors make sure the article is peer-reviewed by independent experts

- All articles are published open access under a CC-BY license

Process:

1. Article submission

2. Publication & data deposition

3. Open peer review & article revision

4. Send to indexers & repositories
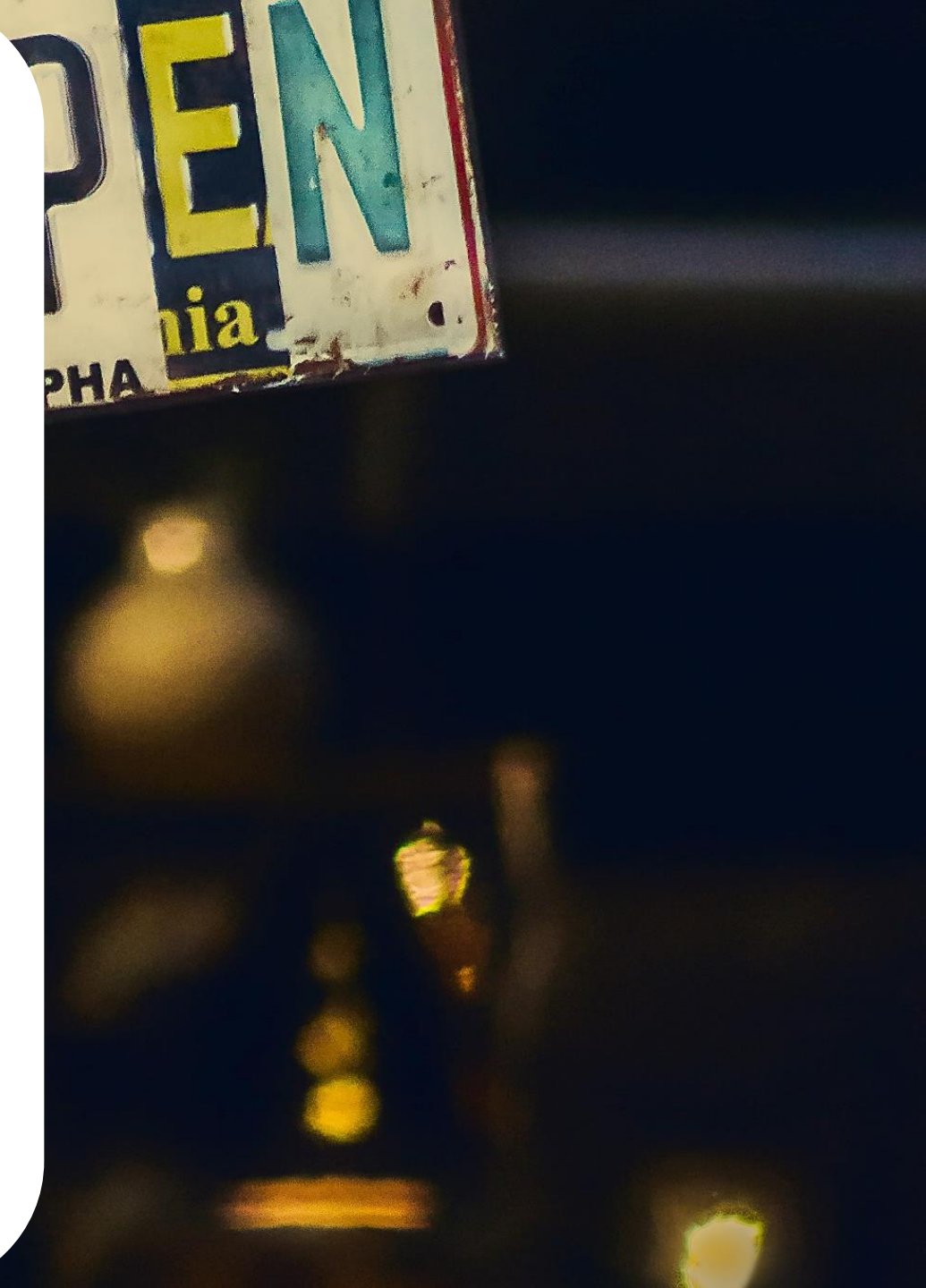
THANK YOU!
for your attention

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