Europa Media Trainings

Project management, reporting and innovation management novelties in Horizon Europe

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EMG Group

Horizon Europe Academy
Horizon Europe Project Management, Financial Rules & Reporting
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CONTENT

1. Mutual insurance mechanism
2. Continuous reporting in Horizon Europe
3. Changes in the HE Periodic reporting
4. Exploitation and innovation management processes
5. EC tools to boost your exploitation efforts

Mutual Insurance Mechanism and the Pre-financing

Mutual Insurance Mechanism (MIM)

Replacing the Guarantee Fund in Horizon Europe

5% Contribution to the Mechanism:

but it can be more, or less.

- Actions require a 5% contribution by the Beneficiaries.
- Periodic evaluation may change it and bring it up to 8% or reduce it under 5%.
- It can be offset from the first pre-financing and be paid to the Mechanism on behalf of the beneficiaries.
- Additional OPTION for programmes with MIM split contribution – contribution can be partially offset from the additional pre-financing.
- The contribution cannot exceed the amount of the initial pre-financing.
- The Mechanism may be extended to beneficiaries of any other directly managed Union programme.
- The Commission shall adopt modalities for participation of beneficiaries of other programmes.

Pre-financing payment

Model Grant Agreement

22.3 Amounts due

22.3.1 Prefinancing payments

The aim of the prefinancing is to provide the beneficiaries with a float.

It remains the property of the EU until the final payment.

For **initial prefinancings** (if any), the amount due, schedule and modalities are set out in the Data Sheet (see Point 4.2).

For **additional prefinancings** (if any), the amount due, schedule and modalities are also set out in the Data Sheet (see Point 4.2). However, if the statement on the use of the previous prefinancing payment shows that less than 70% was used, the amount set out in the Data Sheet will be reduced by the difference between the 70% threshold and the amount used.

The contribution to the Mutual Insurance Mechanism will be retained from the prefinancing payments (at the rate and in accordance with the modalities set out in the Data Sheet, see Point 4.2) and transferred to the Mechanism.

Prefinancing payments (or parts of them) may be offset (without the beneficiaries' consent) against amounts owed by a beneficiary to the granting authority — up to the amount due to that beneficiary.

→ **e.g. Erasmus**

Reporting and Payments options

Draft Corporate Model Grant Agreement – Data Sheet

4. Reporting, payments and recoveries

4.1 Continuous reporting (art 21)

Deliverables: see Funding & Tenders Portal Continuous Reporting tool

[OPTION for HE ERC Grants: **Progress reports (ERC Scientific report)**: No/Yes (deadline for submission, 60 days after end of period)

Progress report No	Month from	Month to
1	[number]	[number]
2	[number]	[number]

Reporting and payment modalities (art 21, 22)**:**

Mutual Insurance Mechanism (MIM): Yes

MIM contribution: *[5-8%][*[…]*%]* of the maximum grant amount ([insert amount]), retained from the initial prefinancing *[additional OPTION if selected for the call:*, […]% of the maximum grant amount ([insert amount]), retained from the second prefinancing*][additional OPTION if selected for the call:* and […]% of the maximum grant amount ([insert amount]), retained from the third prefinancing*]*

Restrictions on distribution of initial prefinancing: The prefinancing may be distributed only if the minimum number of beneficiaries set out in the call condititions (if any) have acceded to the Agreement and only to beneficiaries that have acceded.

Interim payment ceiling (if any): 90% of the maximum grant amount

Reporting and Payments options

Draft Corporate Model Grant Agreement – Data Sheet

4.2 Periodic reporting and payments

Reporting and payment schedule (art 21, 22):

Reporting					Payments	
Reporting periods			Type	Deadline	Type	Deadline (time to pay)
RP No	Month from	Month to				
					Initial prefinancing	*[OPTION 1 by default:* 30 days from entry into force/10 days before starting date – whichever is the latest*]* *[OPTION 2: if selected for the call:* n/a*]*
1	[number]	[number]	Additional prefinancing report	60 days after end of reporting period	Additional prefinancing	*[OPTION 1 if selected for the grant:* 60 days from receiving additional prefinancing report – whichever is the latest*][OPTION 2:* n/a*]*
2	[number]	[number]	Periodic report	60 days after end of reporting period	Interim payment	*[OPTION 1 if selected for the grant:* 90 days from receiving periodic report*][OPTION 2:* n/a*]*
3	[number]	[number]	Periodic report	60 days after end of reporting period	Final payment	90 days from receiving periodic report

➡ **e.g. Erasmus**

Continuous reporting in Horizon Europe

Continuous Reporting

New in Horizon Europe

"Specific focus will be put on enhancing the quality of the data collected through the various forms and reporting templates.

This initiative aims at providing close to real time and quality data for reporting and analytical purposes, reducing data maintenance costs and enhancing data integration.

To this extent, the Commission intends to enhance e-forms and reporting templates used by beneficiaries"

The reporting will include amongst others, enhanced sections for IP management and open science

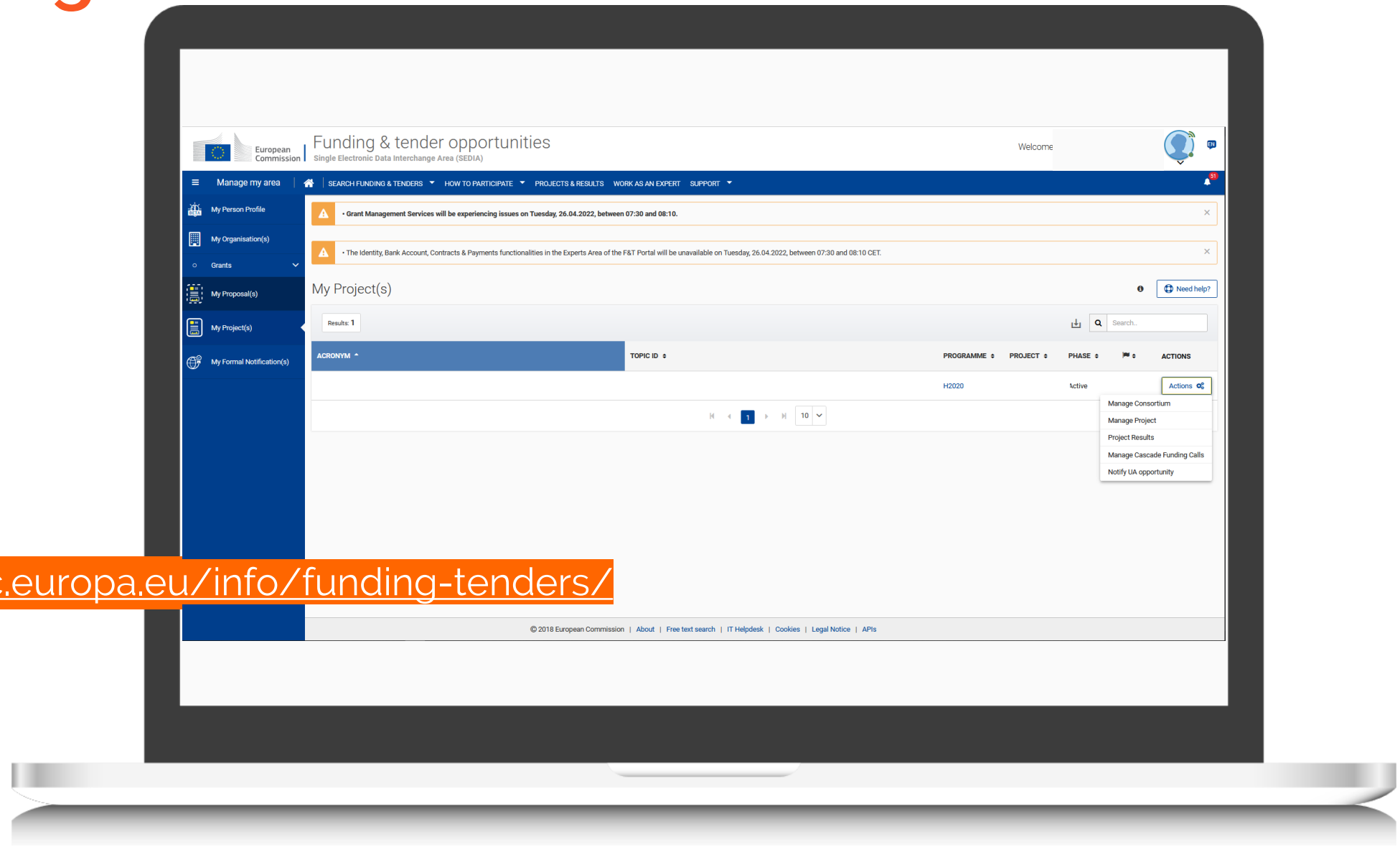
ARTICLE 21 — REPORTING

21.1 Continuous reporting

The beneficiaries must continuously report on the progress of the action (e.g. **deliverables, milestones**, **outputs/outcomes, critical risks, indicators,** etc; if any), in the Portal Continuous Reporting tool and in accordance with the timing and conditions it sets out (as agreed with the granting authority).

Standardised deliverables (e.g. progress reports not linked to payments, reports on cumulative expenditure, special reports, etc; if any) must be submitted using the templates published on the Portal.

The Funding and Tenders Portal



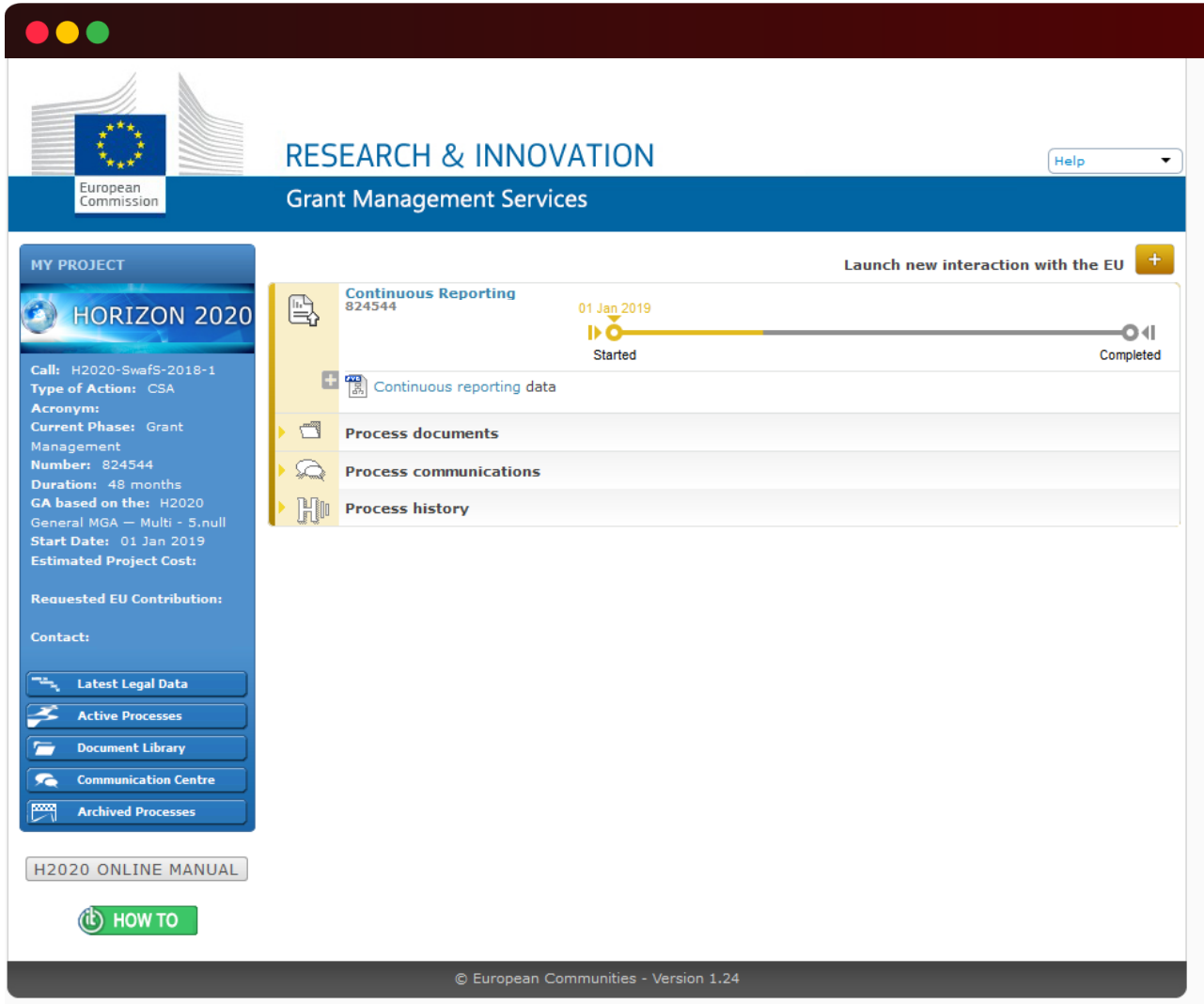
https://ec.europa.eu/info/funding-tenders/

Continuous reporting module

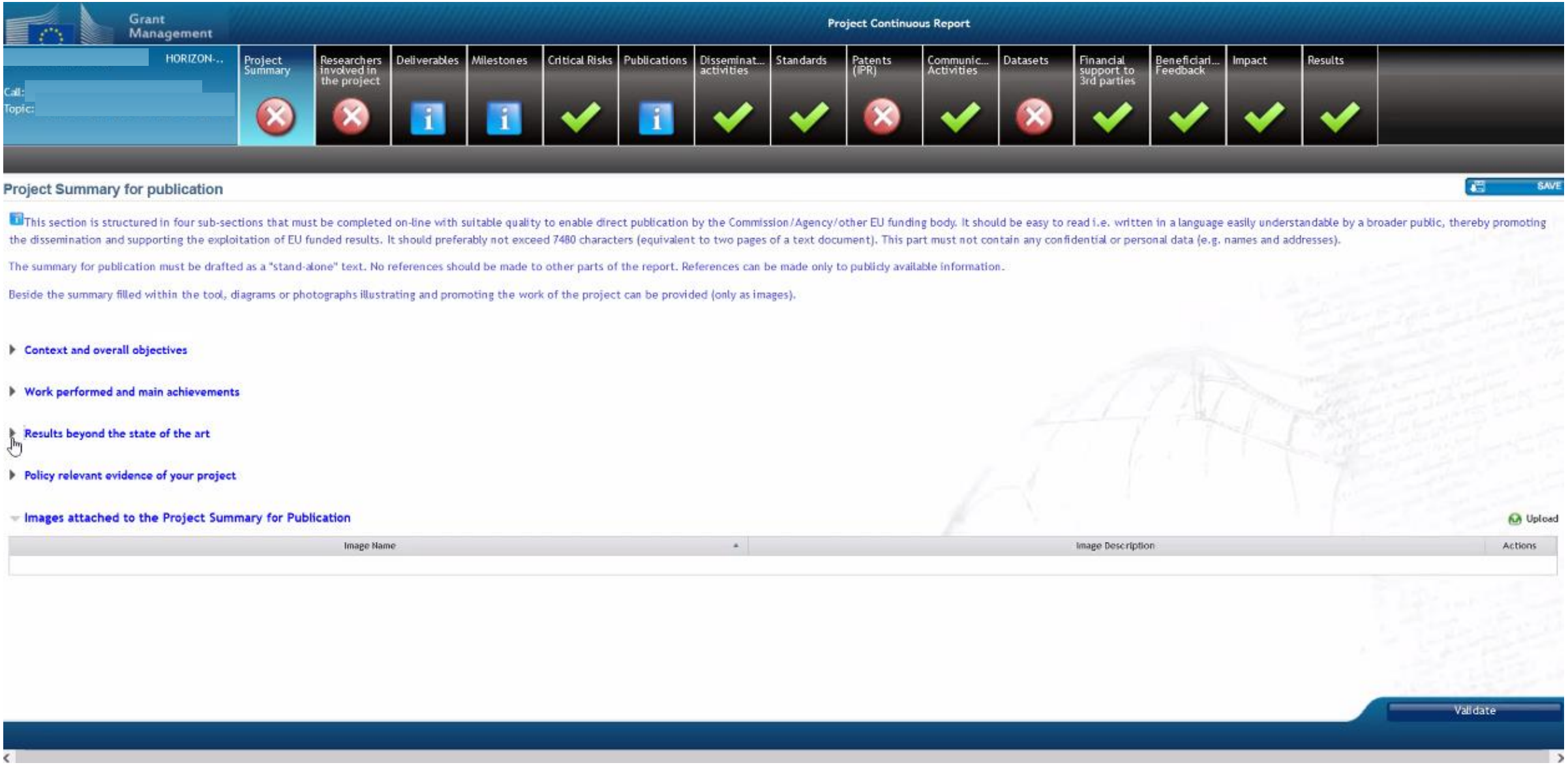
FUNCTIONS:

- Enter publishable summary
- Submit deliverables
- Report progress in achieving milestones
- Follow up critical risks
- Report on the impact and the project results
- Report communication and dissemination actions
- Publications and Datasets… etc

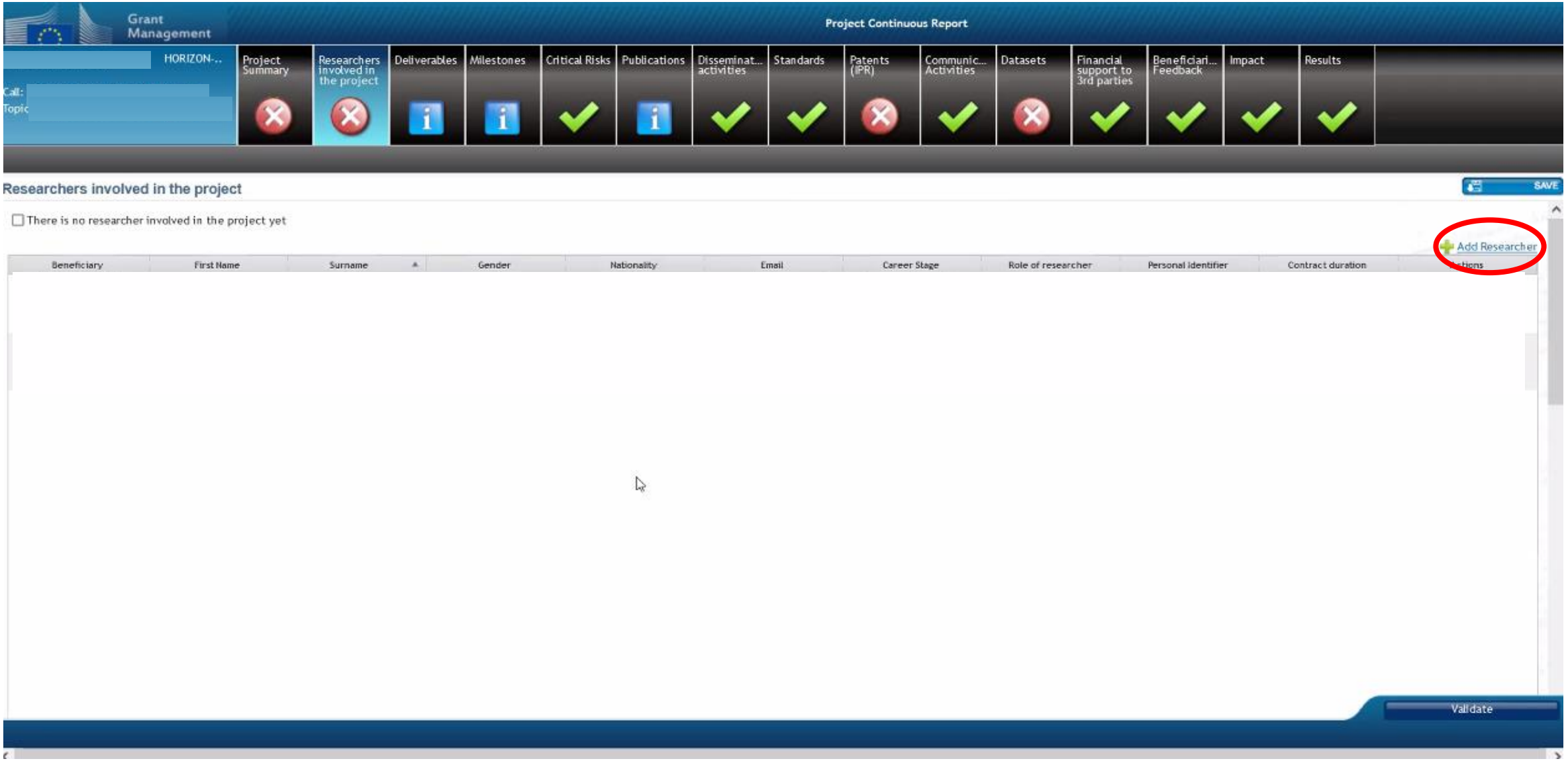
Continuous Reporting is activated at the project start!



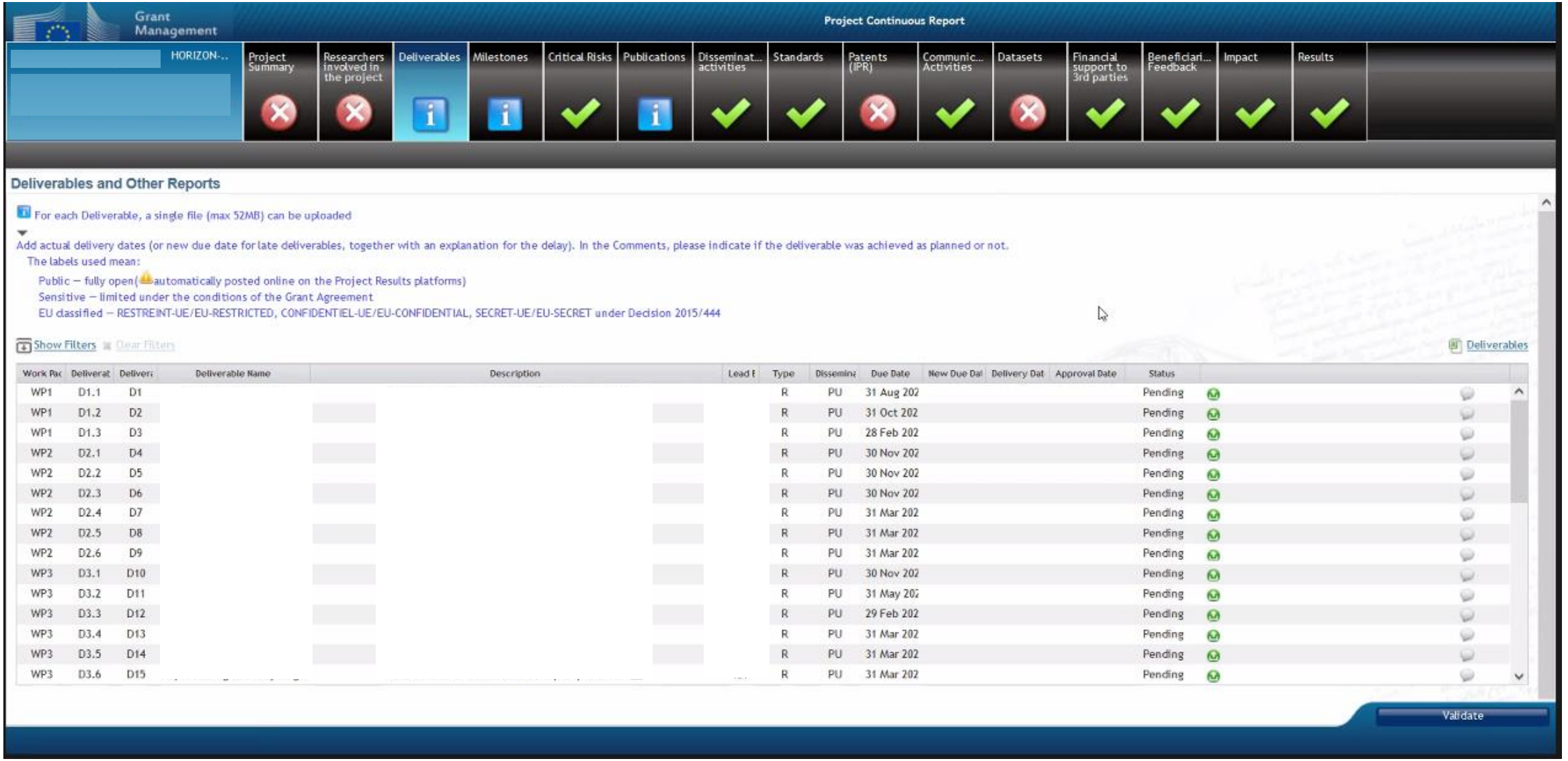
Project Summary



Researchers involved in the project

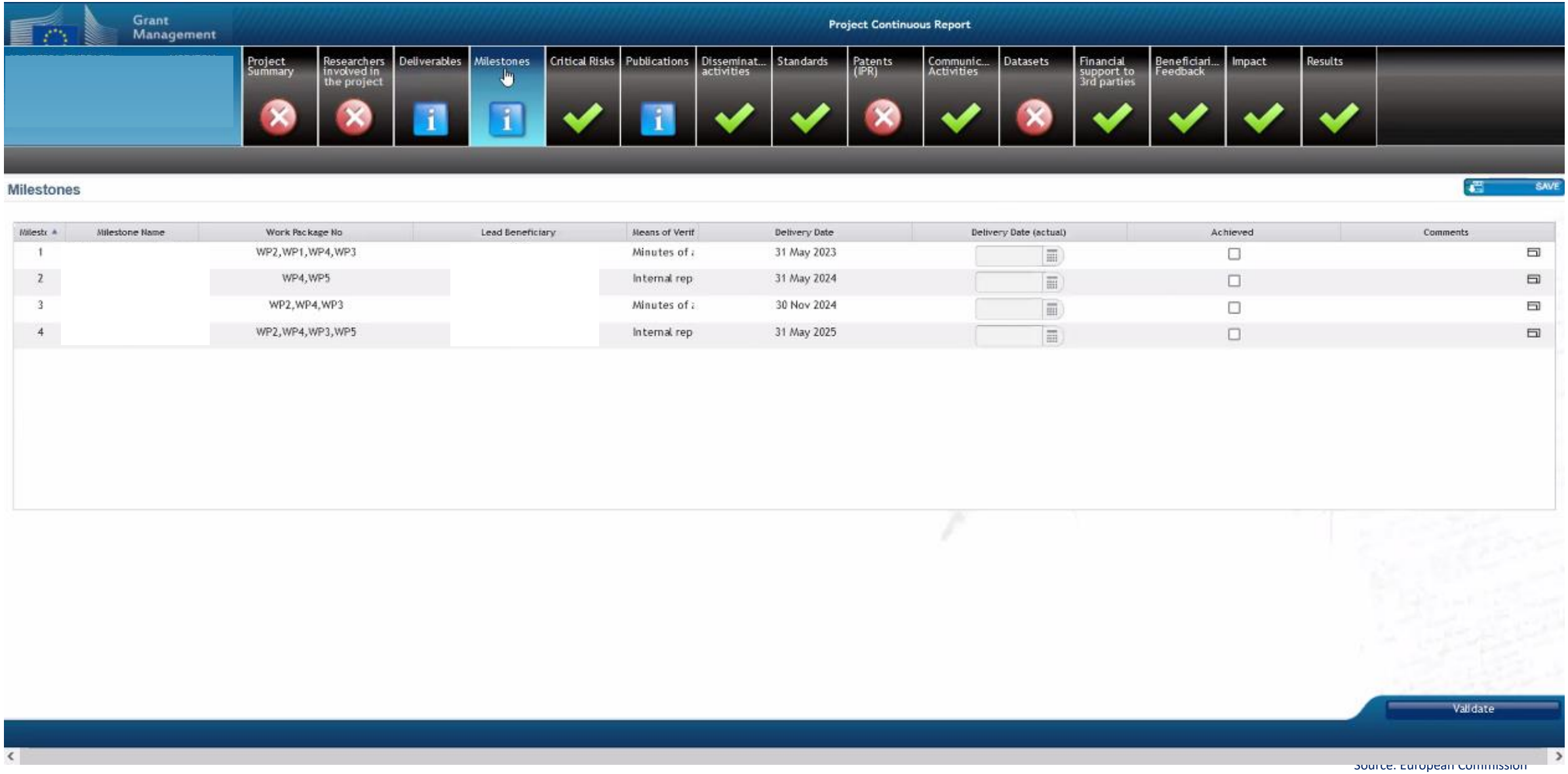


Deliverables



Source: European Commission

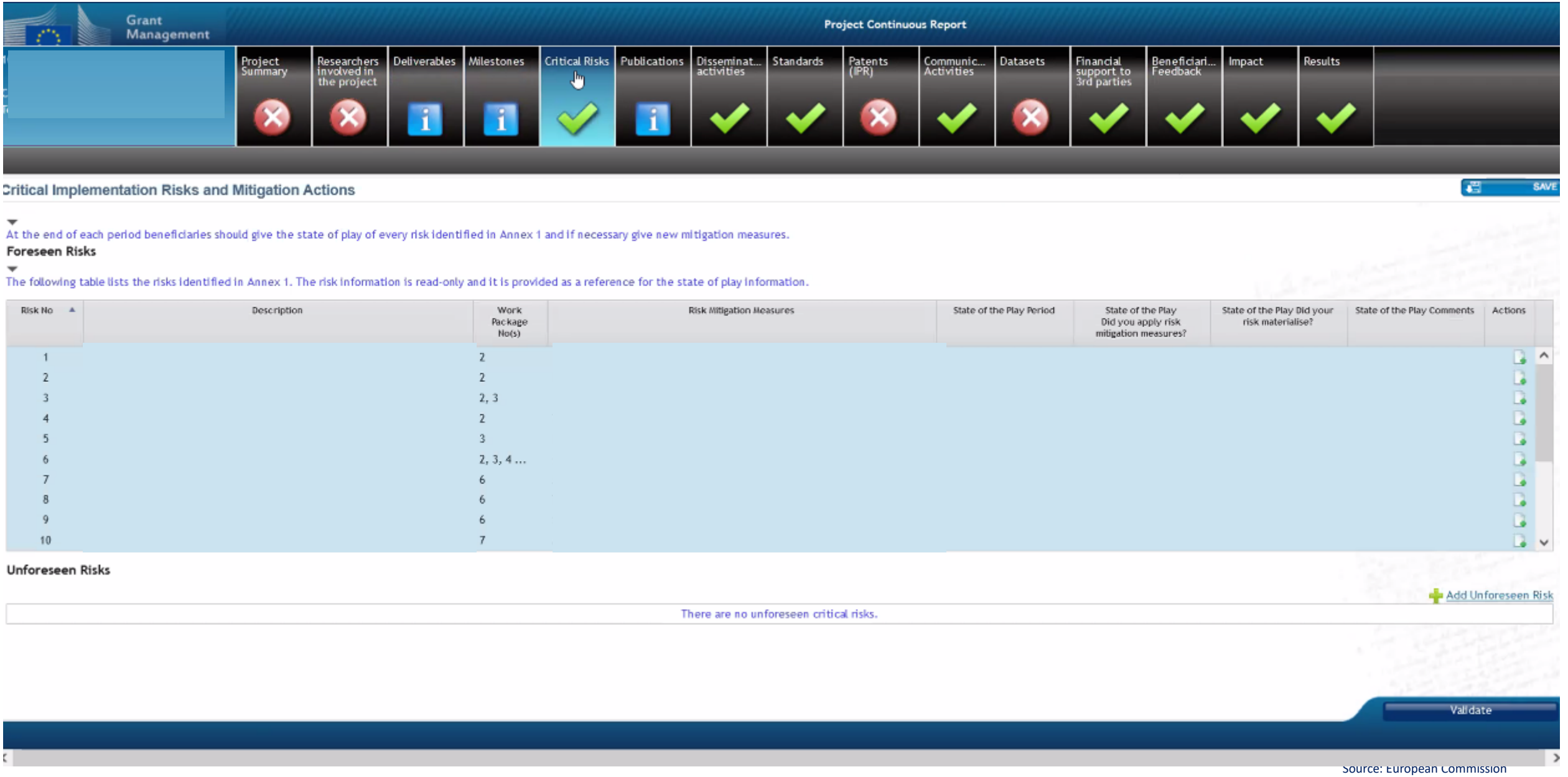
Milestones



Source: European Commission

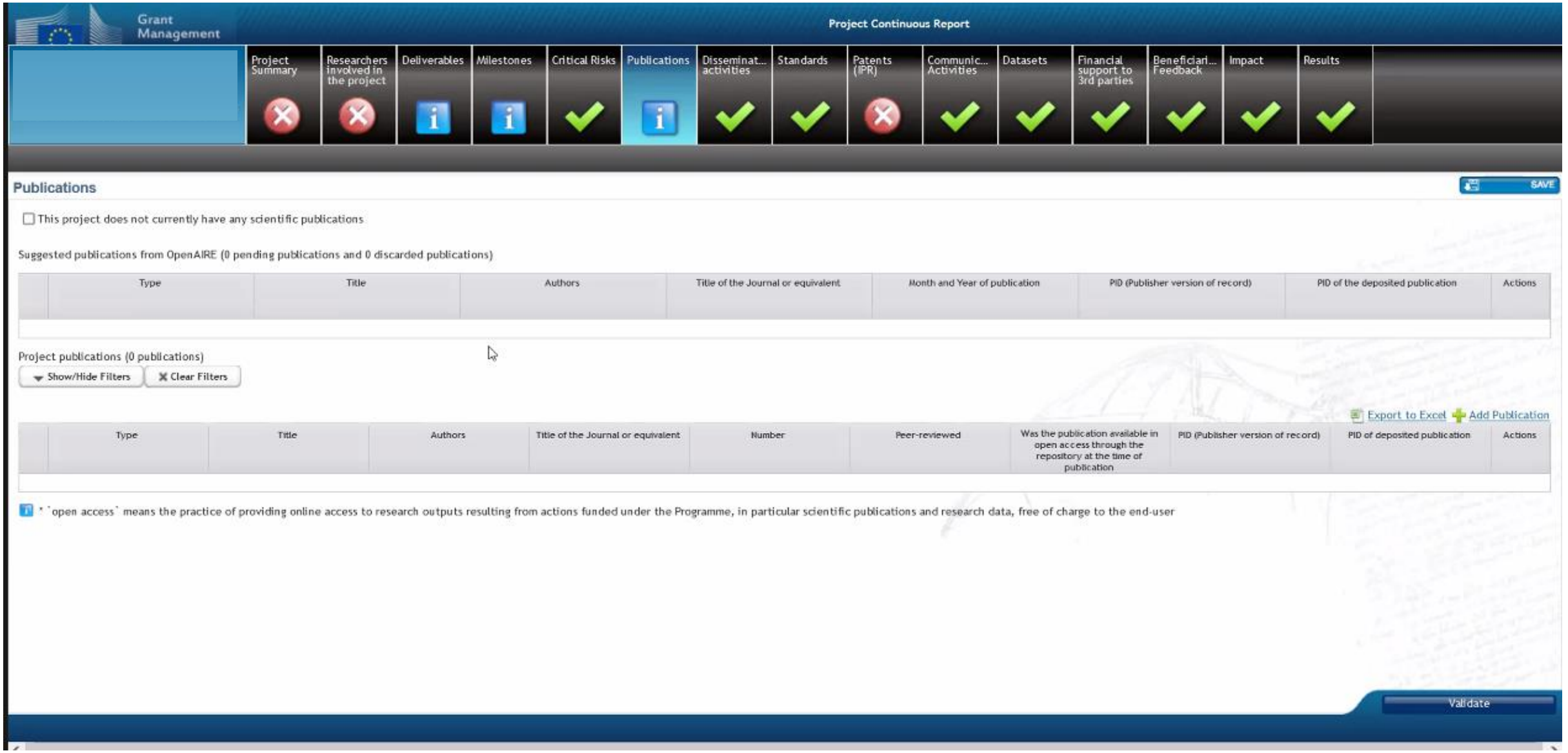
Critical Risks

TRAININGS

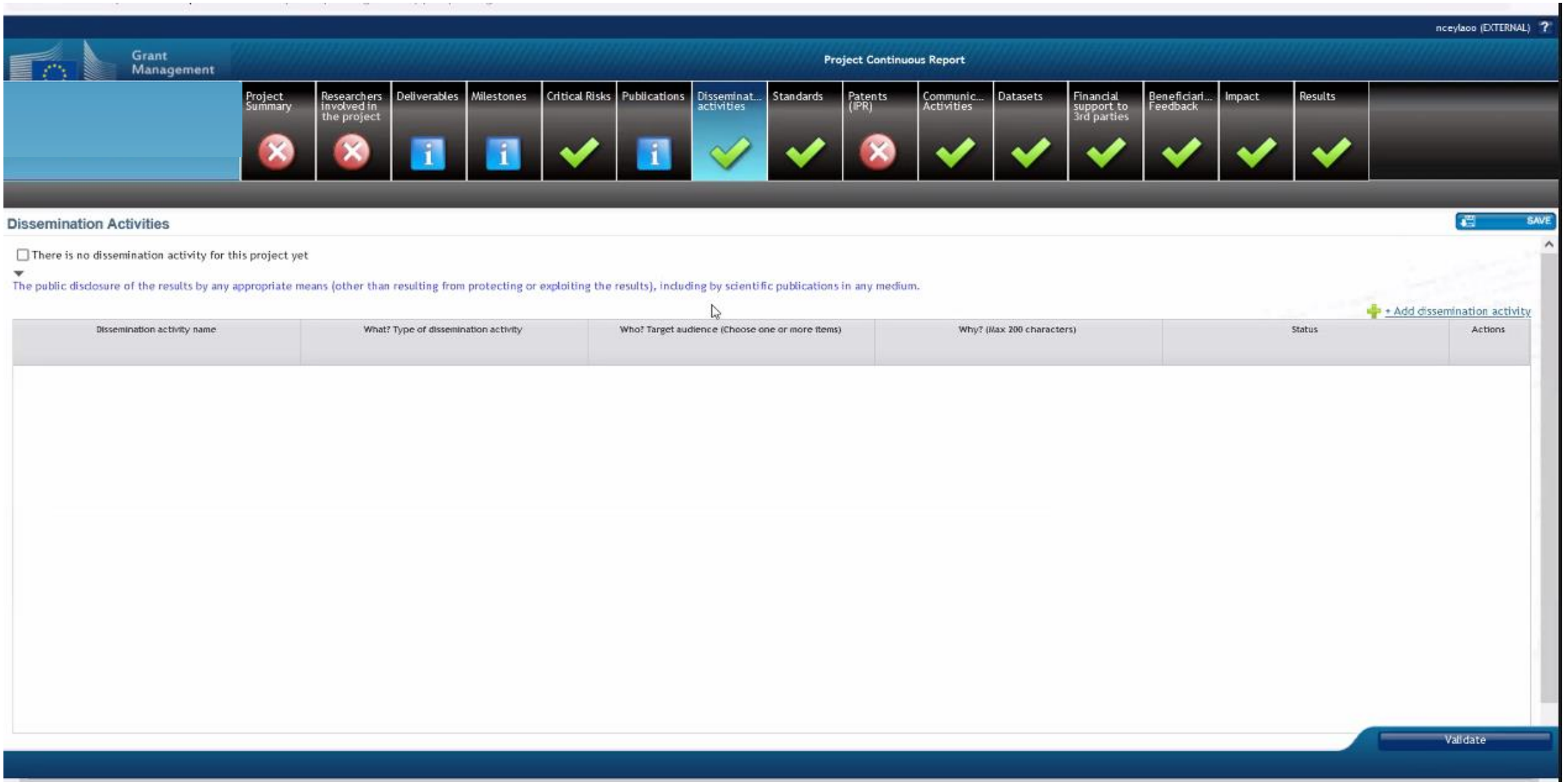


Source: European Commission

Publications

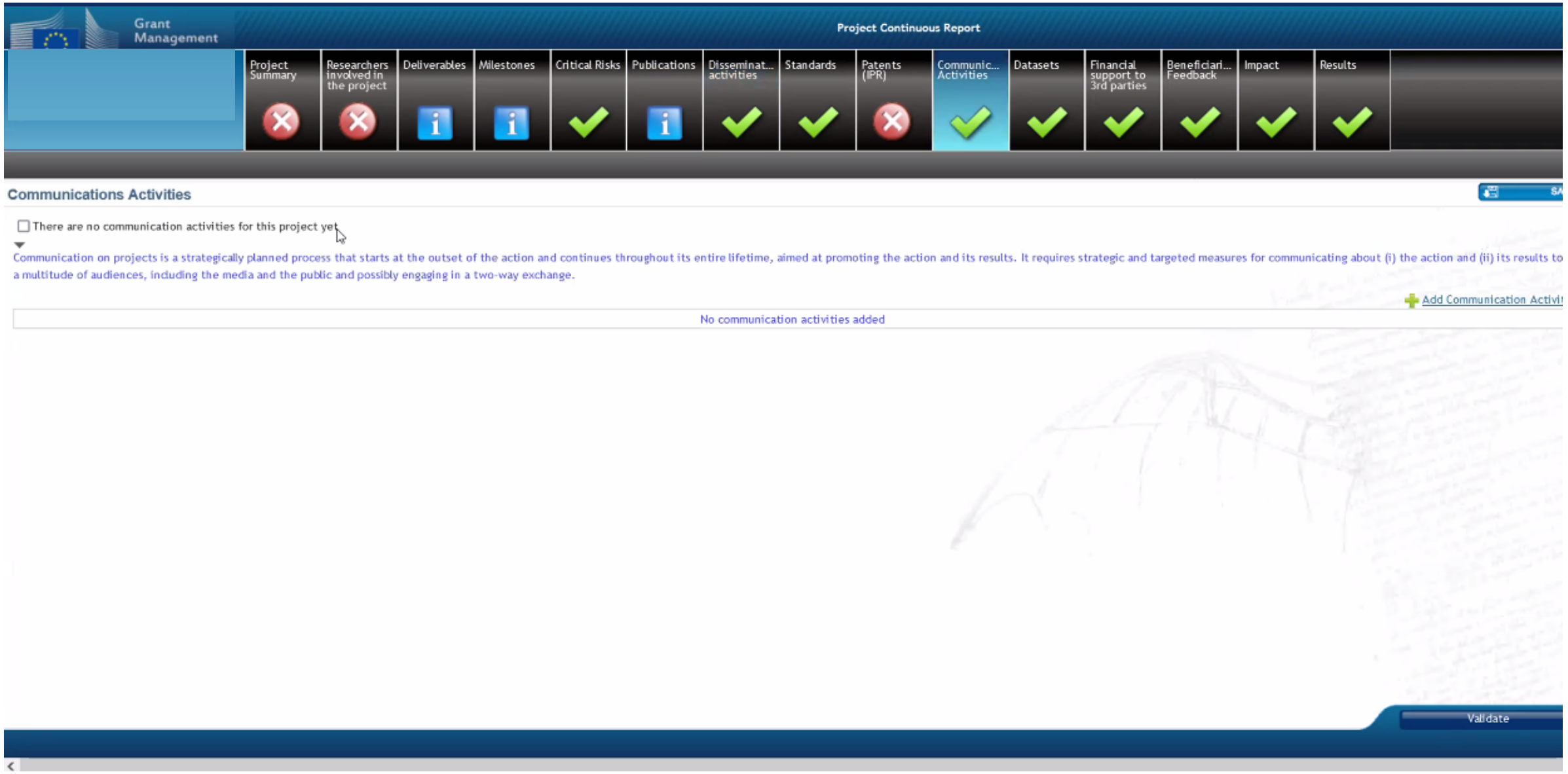


Dissemination activities in HE



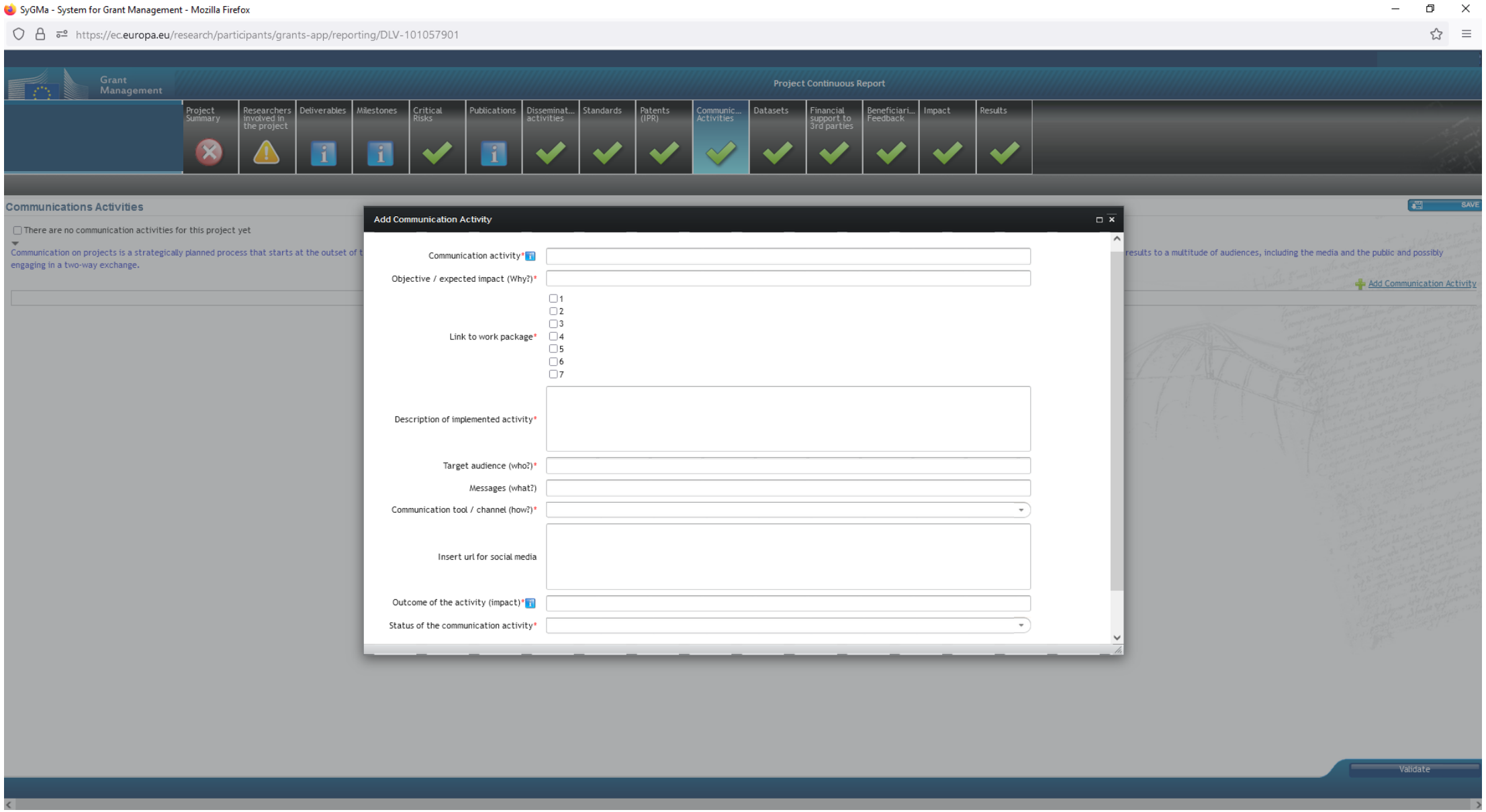
Source: European Commission

Communication activities in HE

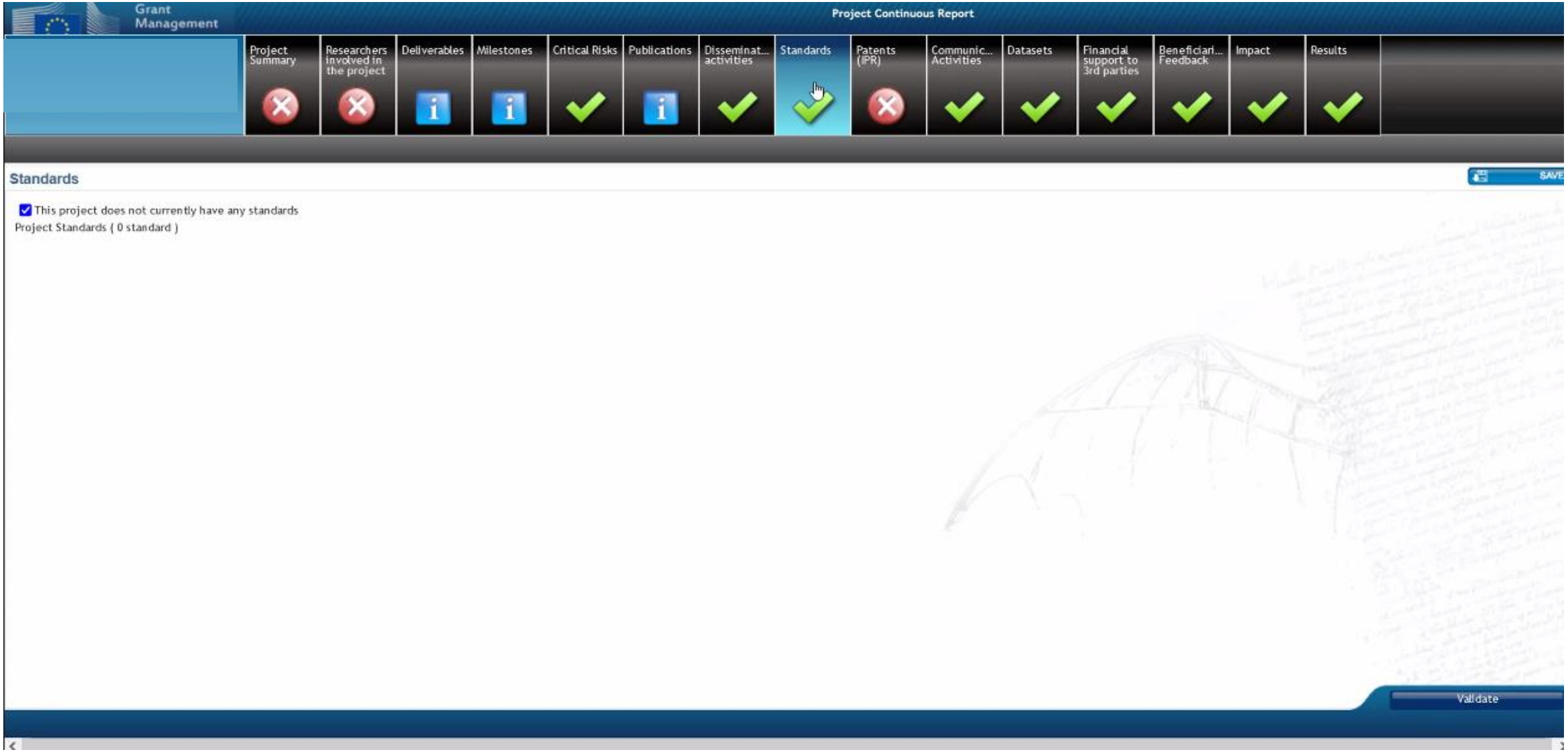


Source: European Commission

Communication activities in HE

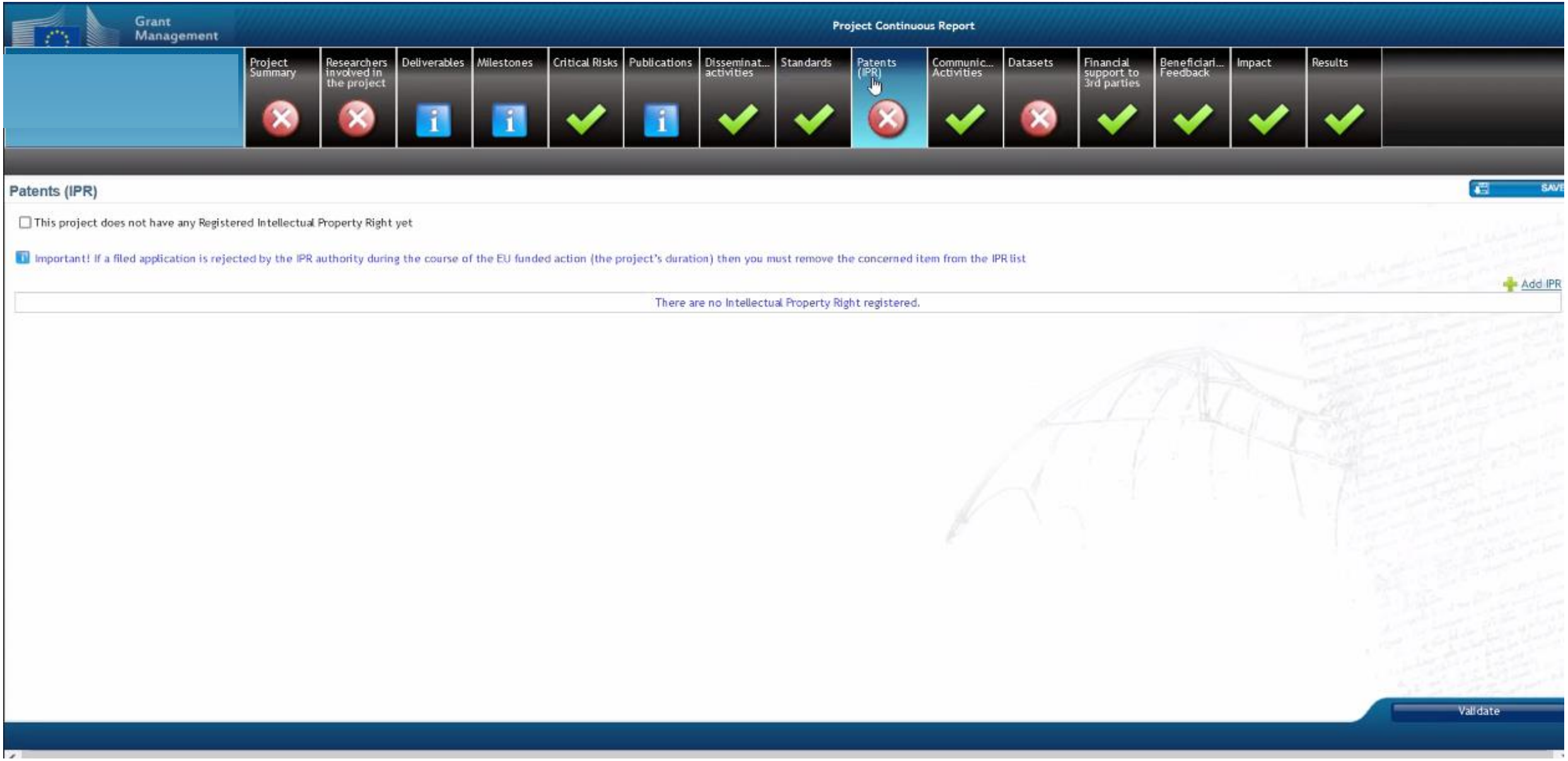


Standards



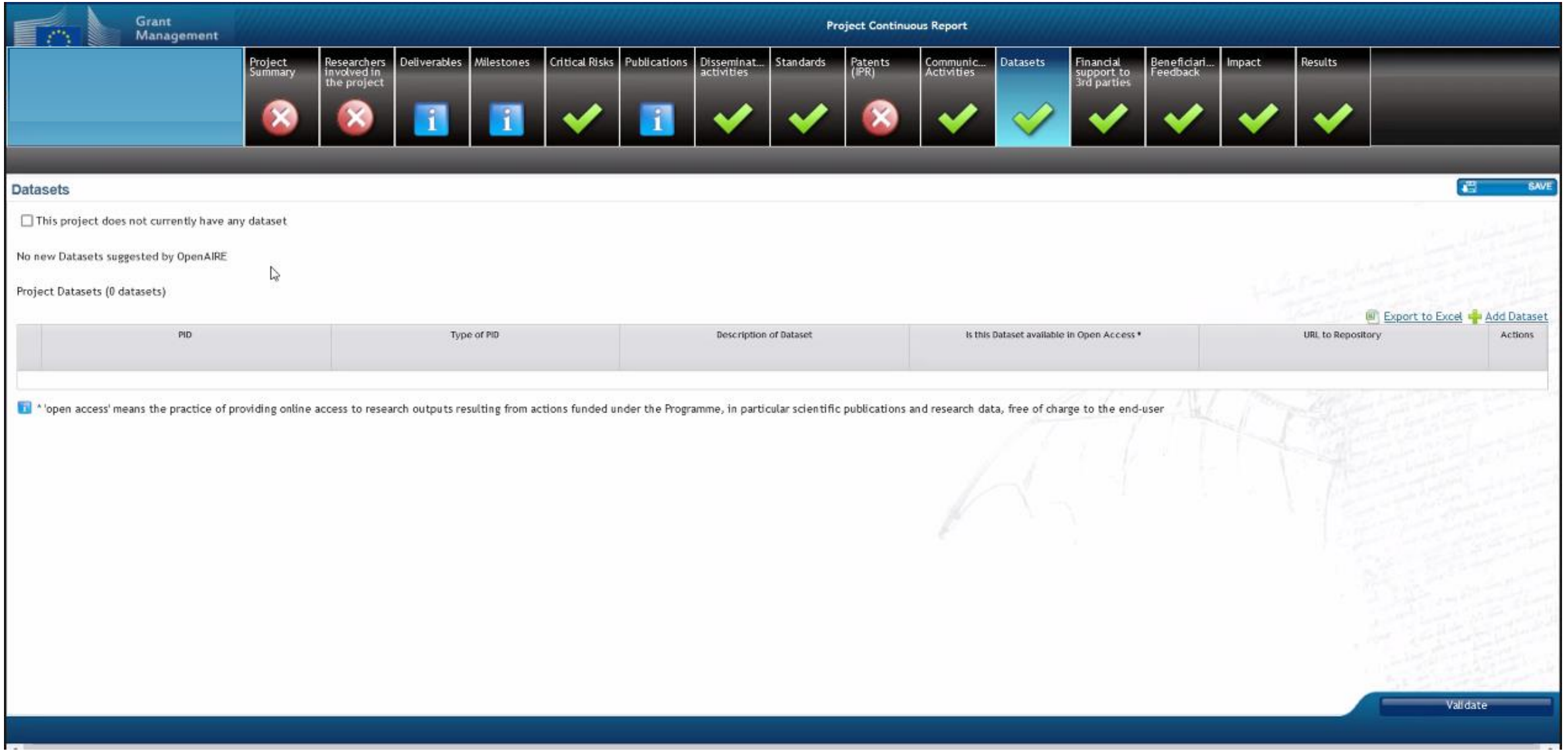
Source: European Commission

Patents (IPR)



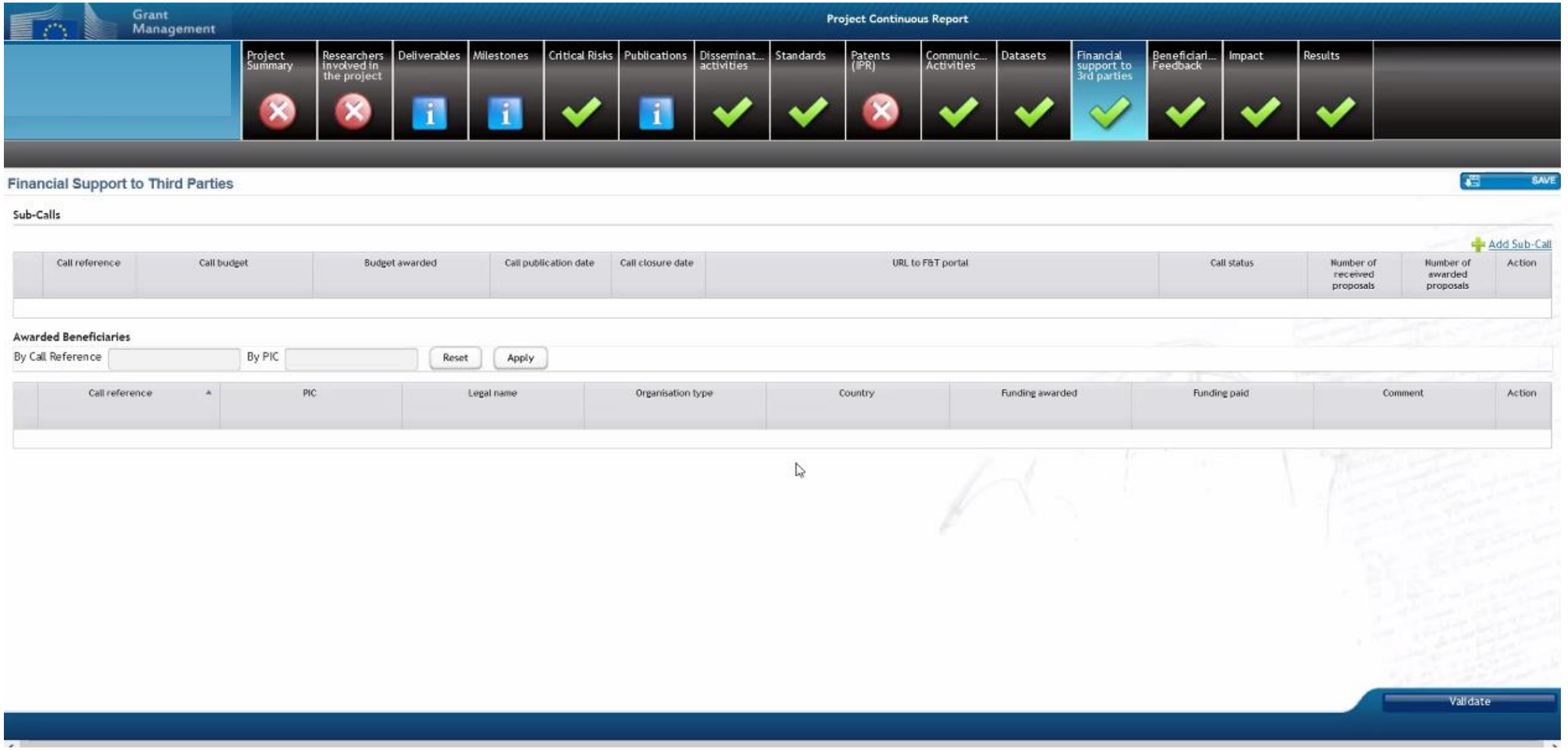
Source: European Commission

Datasets



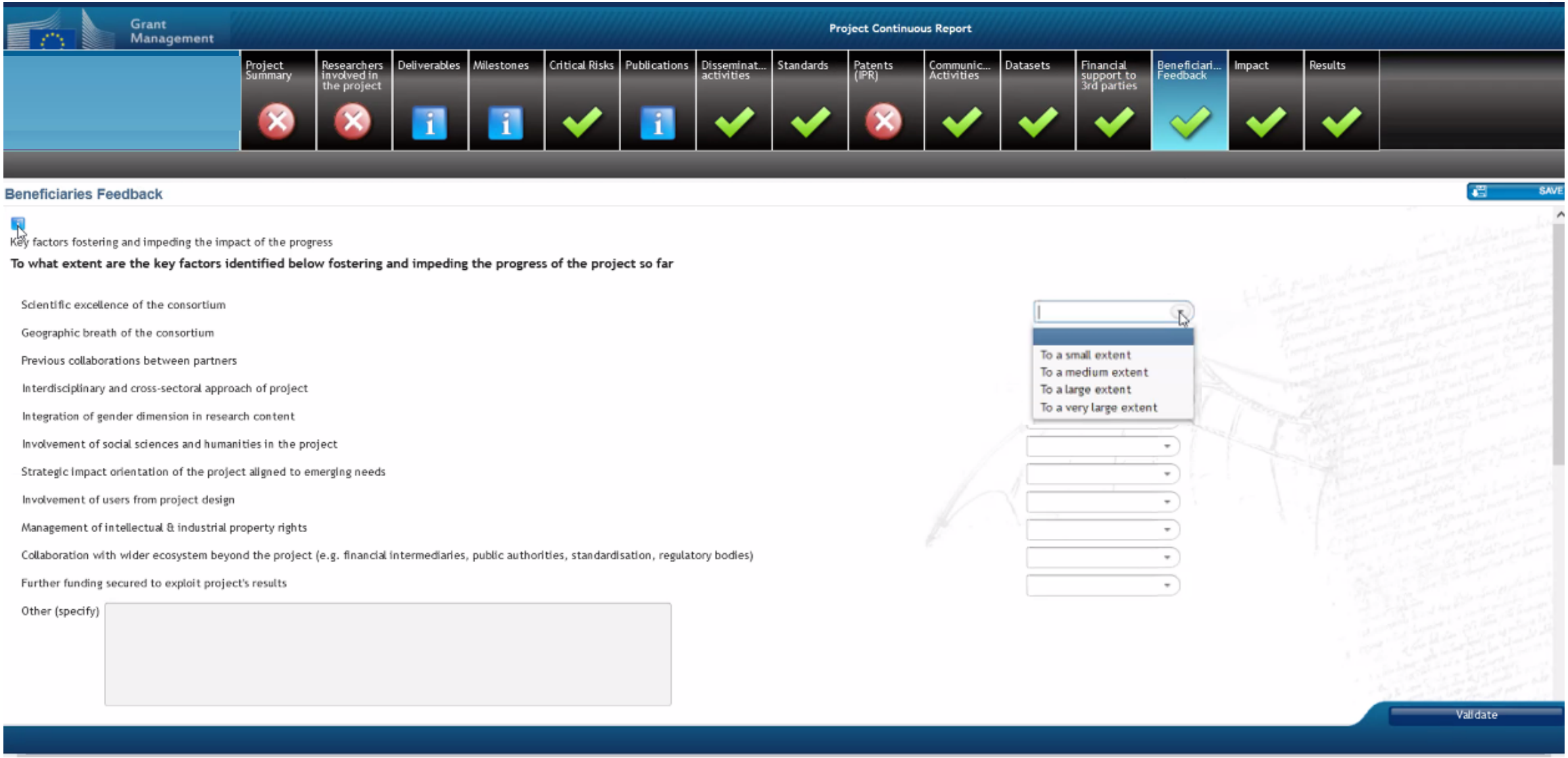
Source: European Commission

Financial support to 3rd parties



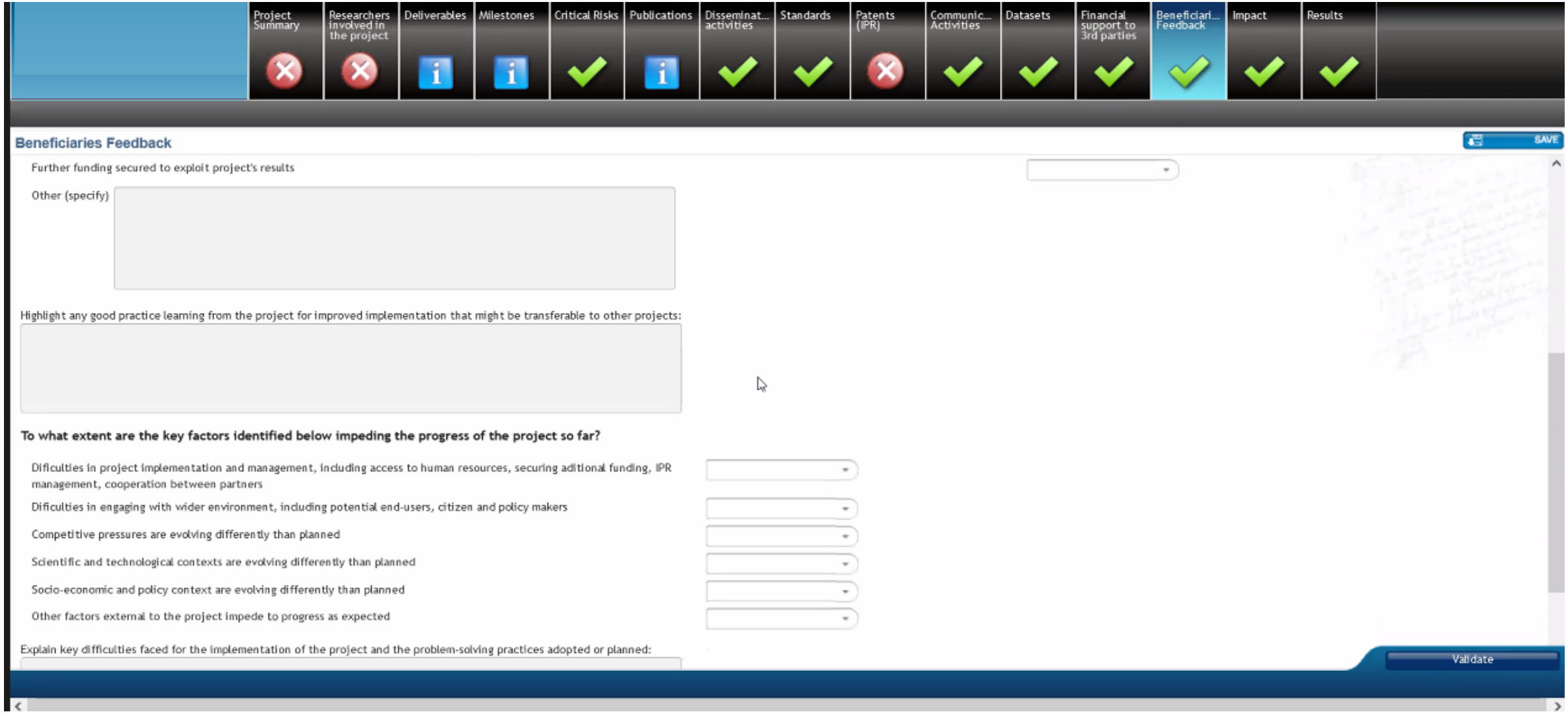
Source: European Commission

Beneficiaries Feedback (1/2)



Source: European Commission

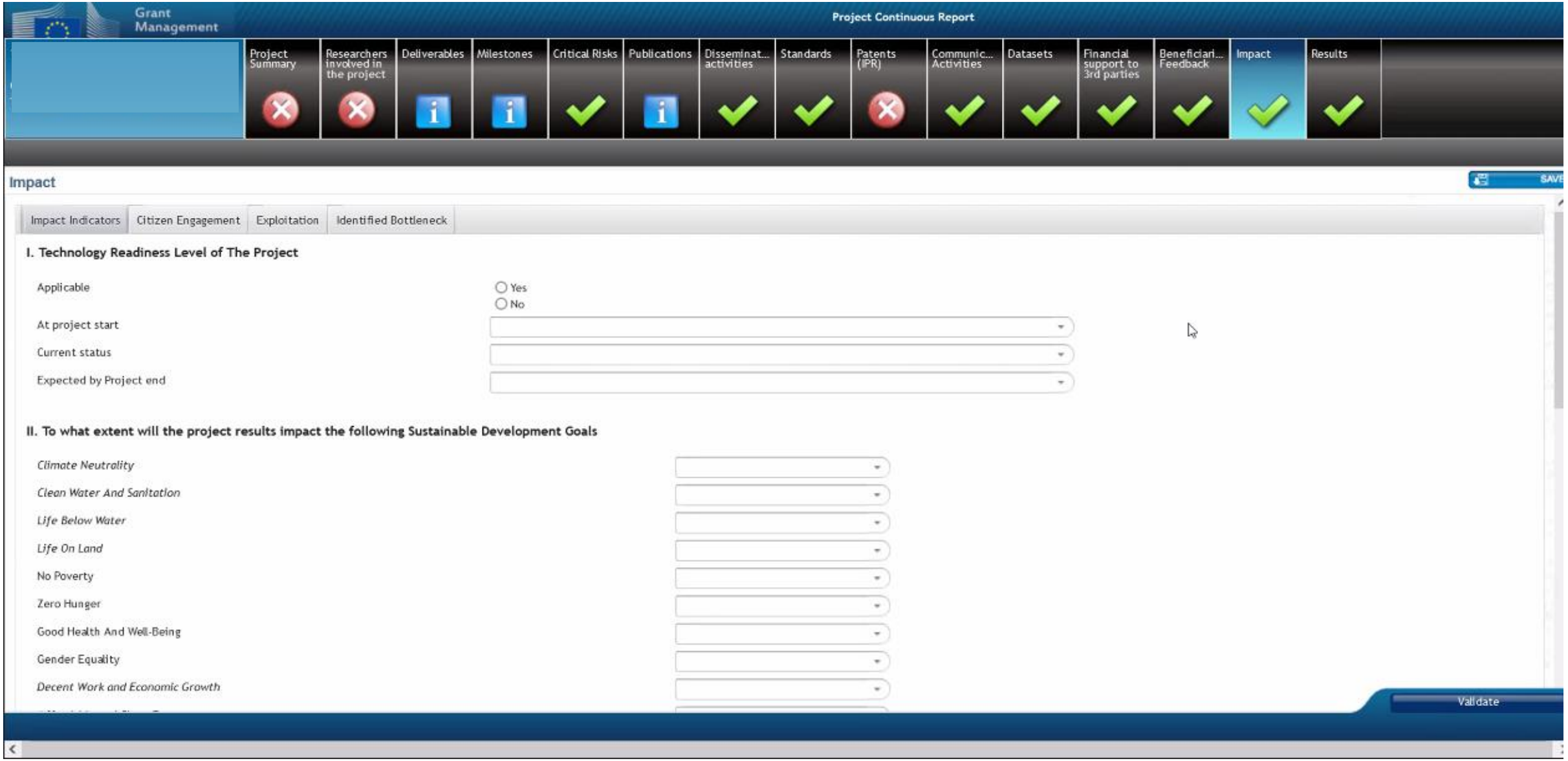
Beneficiaries Feedback (2/2)



Source: European Commission

Impact (1/7)

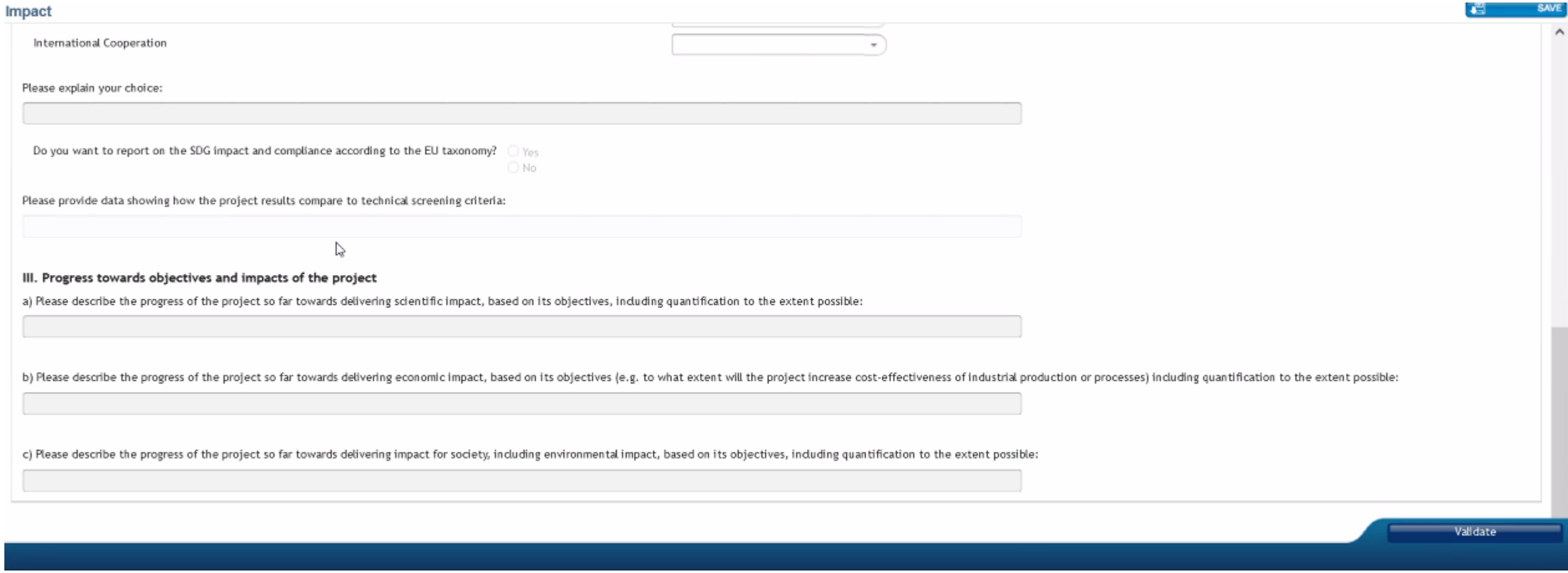
Impact indicators



Source: European Commission

Impact (2/7)

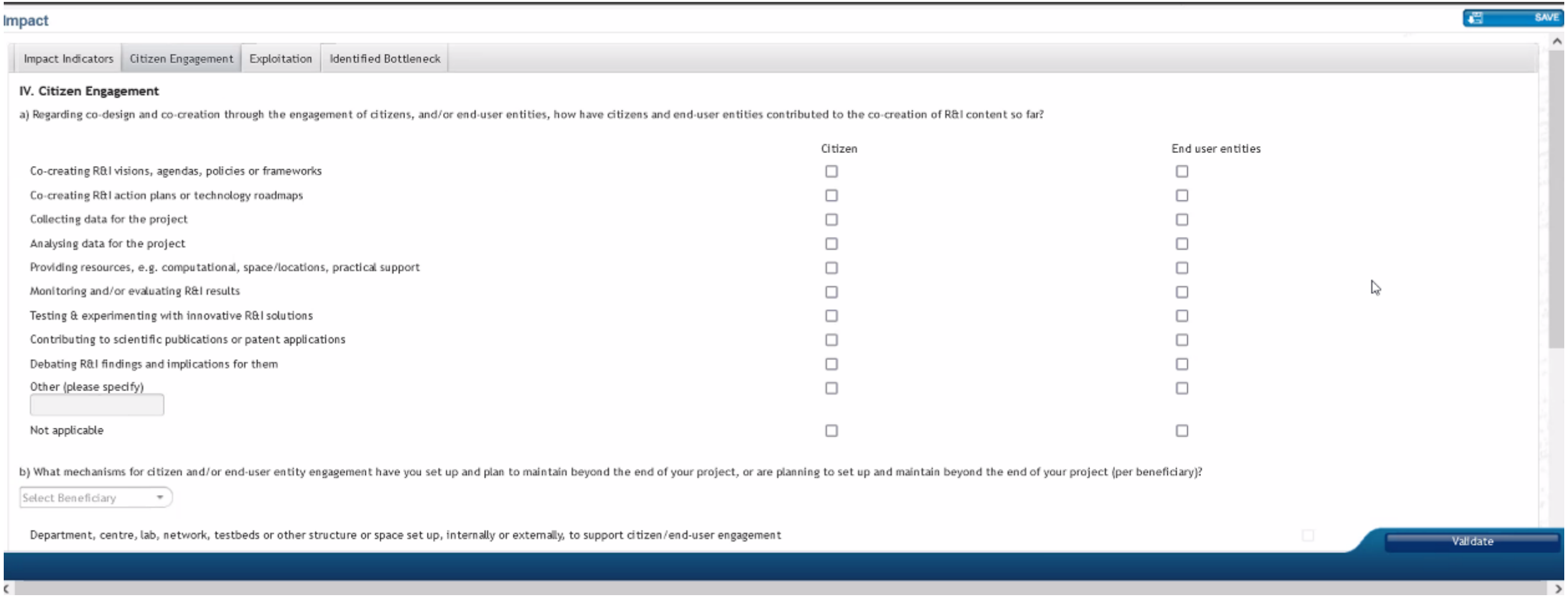
Impact indicators



Source: European Commission

Impact (3/7)

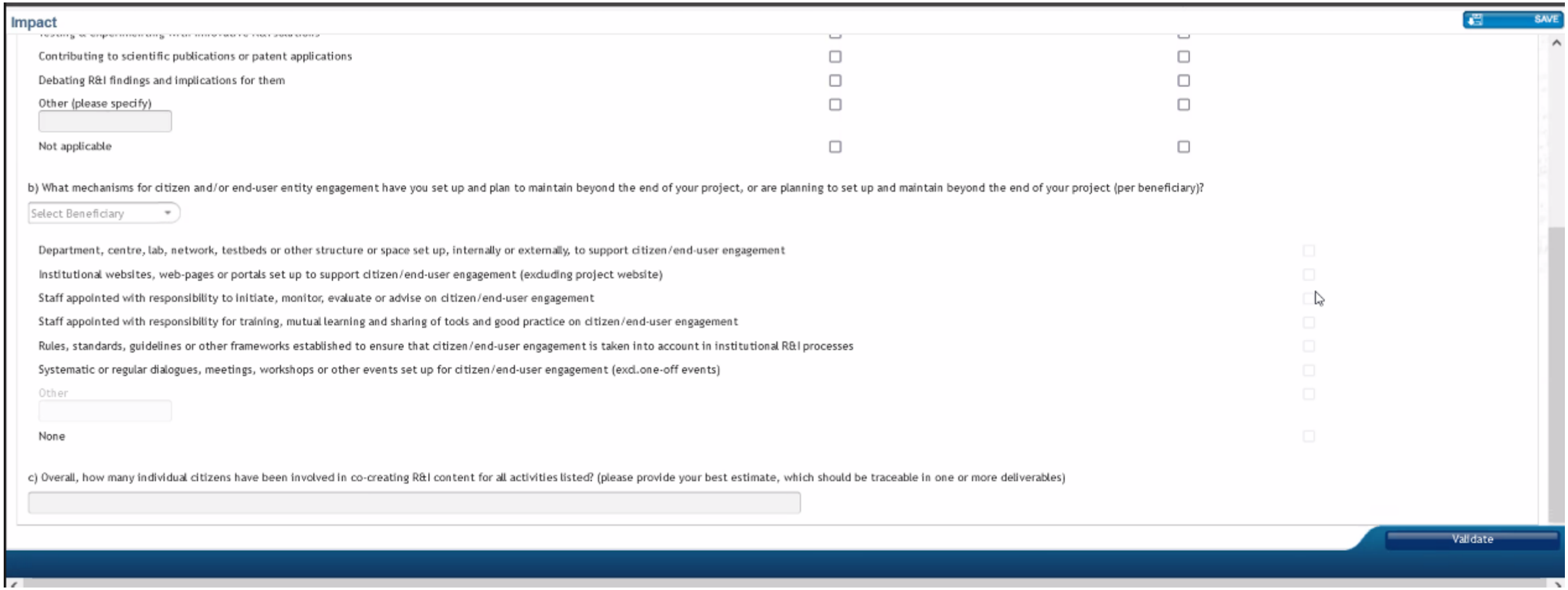
Citizen Engagement



Source: European Commission

Impact (4/7)

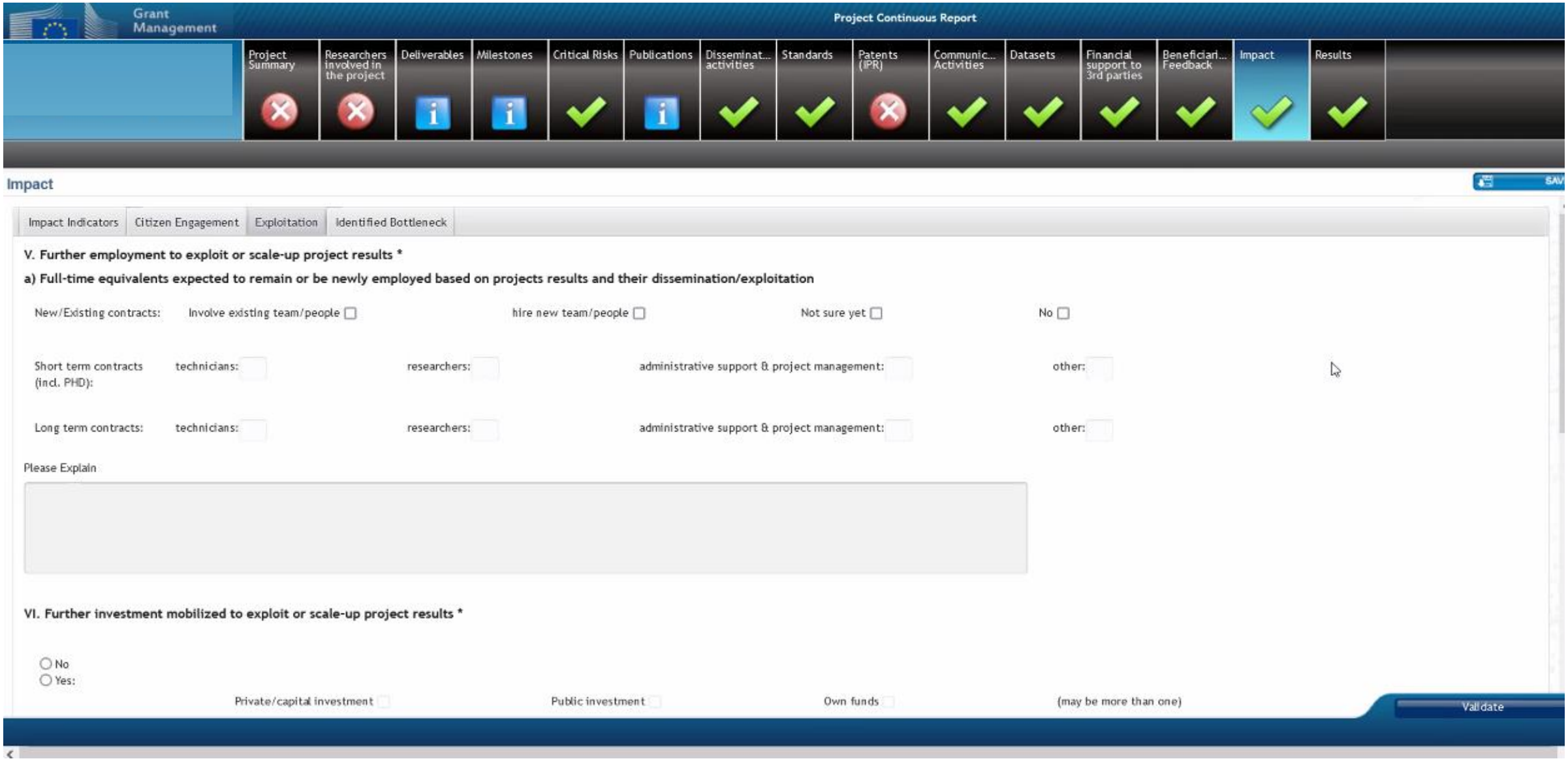
Citizen Engagement



Source: European Commission

Impact (5/7)

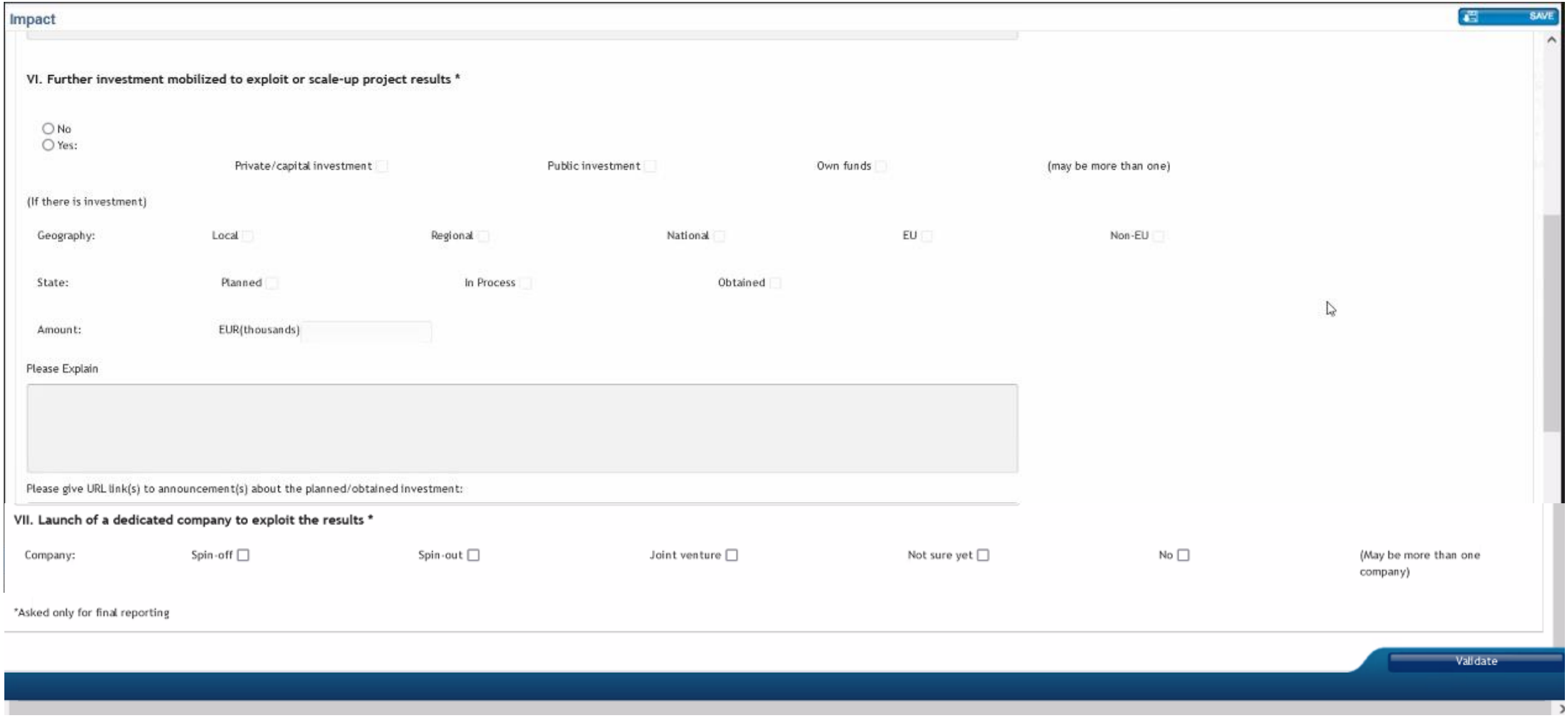
Exploitation



Source: European Commission

Impact (6/7)

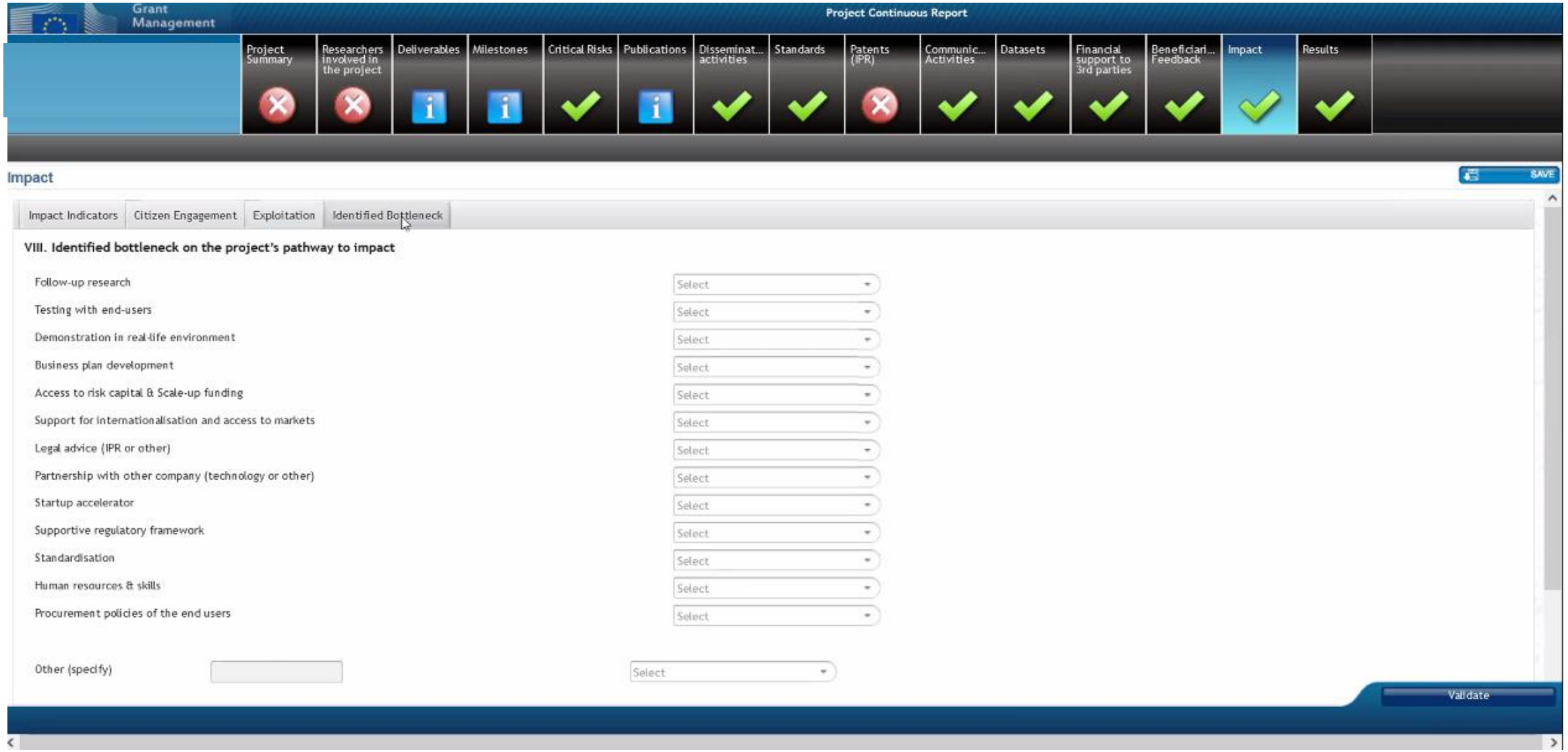
Exploitation



Source: European Commission

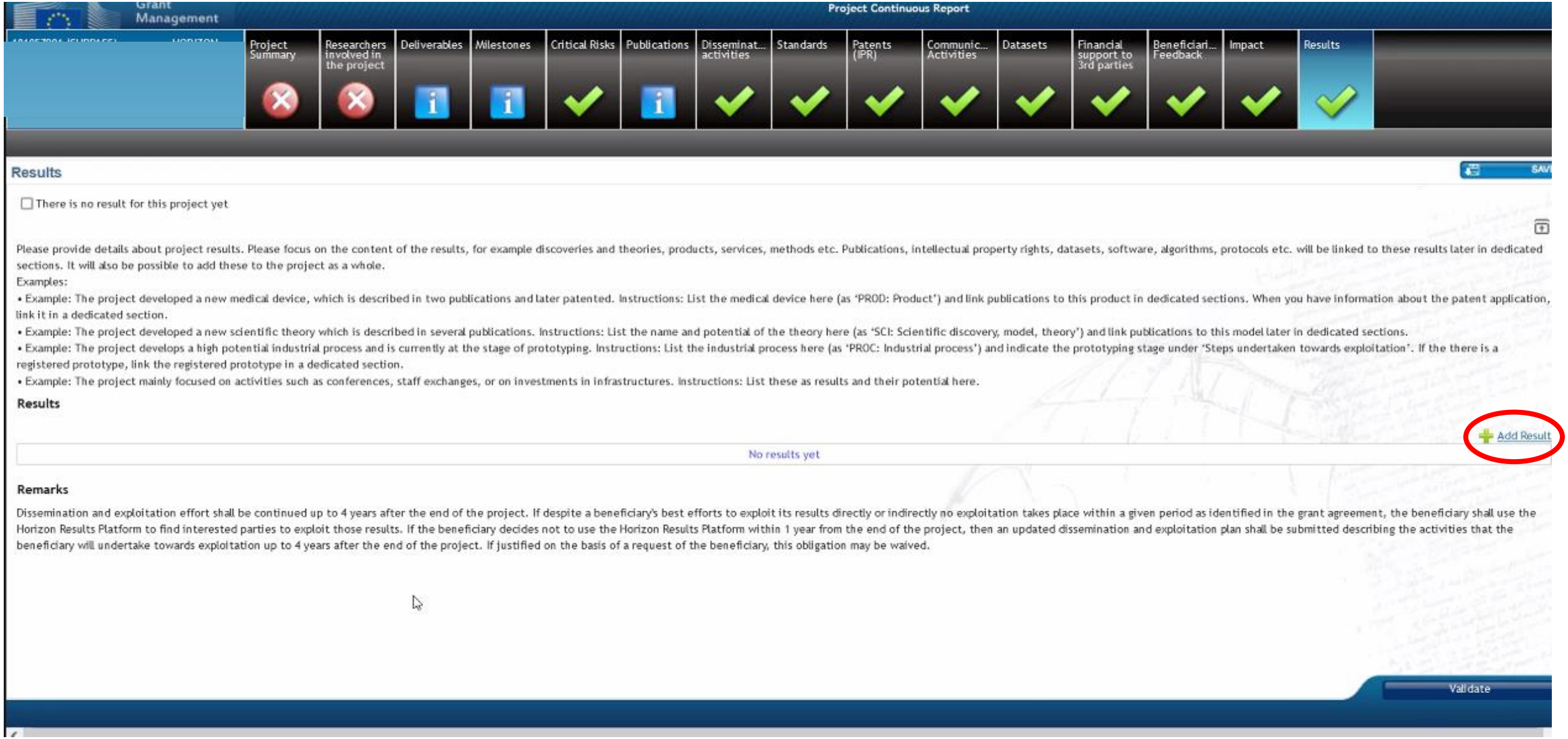
Impact (7/7)

Identified Bottleneck



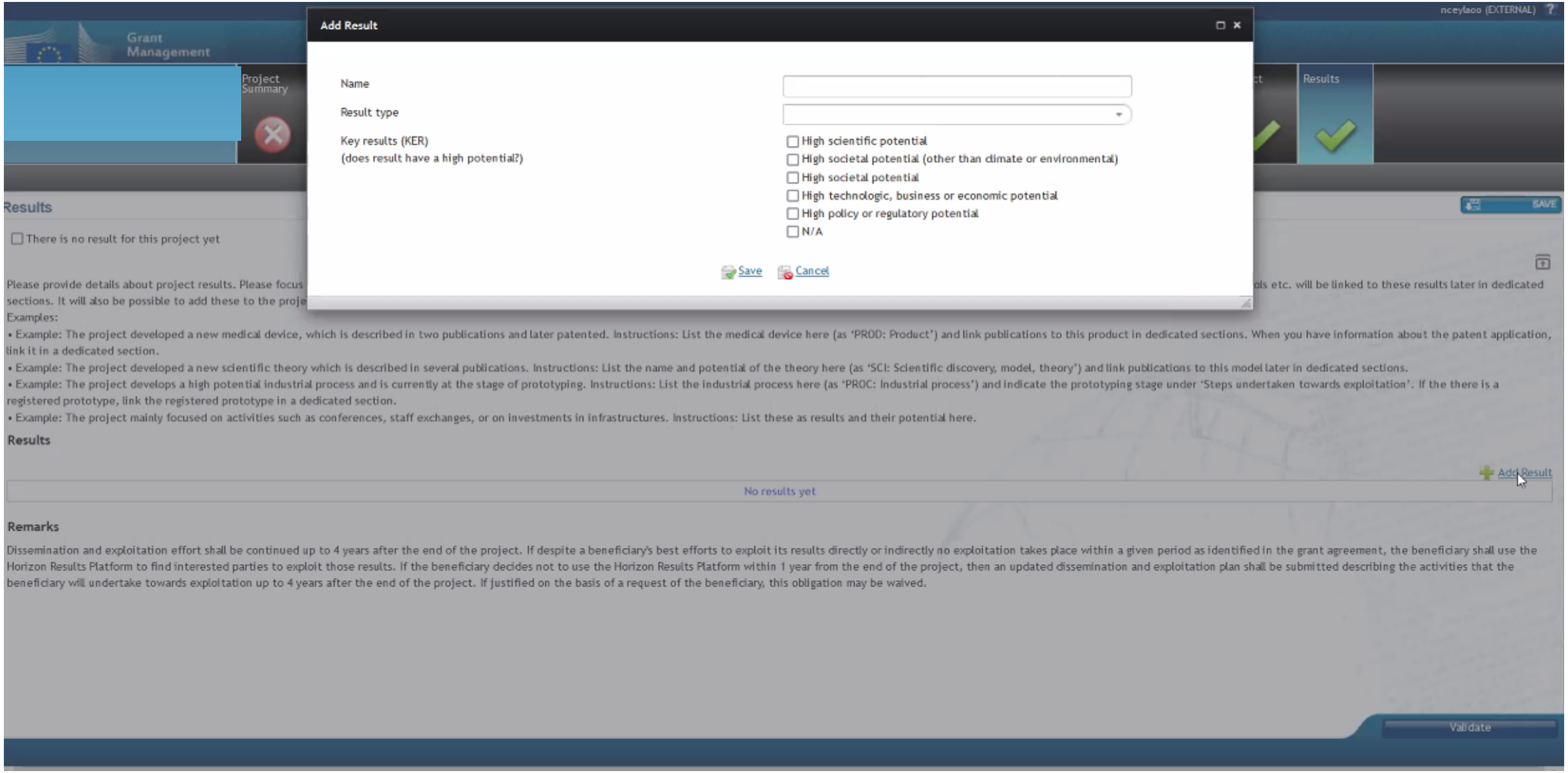
Source: European Commission

Results (1/2)



Source: European Commission

Results (2/2)



Source: European Commission

H2020 periodic reporting overview and the changes in HE periodic reporting

Current changes in HE periodic reporting

Periodic Reporting in HE

Technical and Financial report

21.2 Periodic reporting: Technical reports and financial statements

In addition, the beneficiaries must provide reports to request payments, in accordance with the schedule and modalities set out in the Data Sheet (see Point 4.2):

- for additional prefinancings (if any): an **additional prefinancing report** ➡ **e.g. Erasmus**
- for interim payments (if any) and the final payment: a **periodic report**.

The prefinancing and periodic reports include a technical and financial part.

The technical part includes an overview of the action implementation. It must be prepared using the template available in the Portal Periodic Reporting tool.

The financial part of the additional prefinancing report includes a statement on the use of the previous prefinancing payment.

The financial part of the periodic report includes:

- the financial statements (individual and consolidated; for all beneficiaries/affiliated entities)
- the explanation on the use of resources (or detailed cost reporting table, if required)
- the certificates on the financial statements (CFS) (if required; see Article 24.2 and Data Sheet, Point 4.3).

Reporting: Results Ownership List new

New in Horizon Europe periodic reporting

Table 3.2 Results ownership List						
Single or Joint ownership of result Indicate the number of owners	Result owner(s)	Owner country of establish ment	Will the owner(s) exploit the result?	If relevant, in which form will the result be made available to other consortium member(s) and/or third party(ies)	Does the exploitation of the results require access to background of one or several consortium members?(*) If yes a compulsory question opens below	Does the exploitation of the results require access to third party IPR? ** If yes a compulsory question opens below
[1,2,…]	*[Entity or Individual]* *Entity: Drop down option with project partners + 'Other'. 'Other' opens a field asking for name, address, country, and an identifier such as VAT number.* *Individual: Drop down option with 'researchers in project (pre-filed)' + 'Other'. 'Other' opens a field asking for name, address, country, and an identifier like ORCID, Researcher Id.*	*Pre-field for project partners*	Yes/No	Choose an item.	Yes/No	Yes/ no/ not known

New obligation under HE, it was identified as being an obstacle for the uptake of research results

European Commission

Dissemination and Exploitation – post project

New in Horizon Europe reporting

Obligation of beneficiaries to exploit their R&I results

- In Horizon Europe, as in H2020, the obligation to exploit remains and is a responsibility of the beneficiaries on a “best effort” approach
- When specified in the WP additional exploitation obligations could be applied
- Horizon Europe encourages the use of the R&I results through third party exploitation (where appropriate)
- If despite the best effort for exploitation no uptake happens within a specific period after the end of the project (1 year), then the project must use the Horizon Results Platform to make exploitable results visible (unless obligation is waived)
- The Horizon Results Platform is free, is part of the F&T portal, available to all beneficiaries and is based on results, not on projects.

Follow up on R&I results after the end of the project

- The first year after the end of the project, and if no exploitation takes place, beneficiaries must use the Horizon Results Platform for making their exploitable results visible.
- For the following period there will probably be a structured questionnaire available to beneficiaries to report on the progress, their needs and obstacles on their path for exploitation.
- This questionnaire could be part of the EC grant management system and will remain open until the conclusion of the follow up period after the end of the project where a final report will be created.

Source: EC

H2020 periodic reporting overview

Periodic Report in H2020

Obligations

Periodic report

- Periodic technical report
- Periodic financial report
- Must be submitted **within 60 days** following the end of each reporting period
- Obligation as of the Grant Agreement: Article 20 of the H2020 Grant Agreement

Periodic report for the last reporting period

- Final technical report – summary for publication
- Final financial report - CFSs

Periodic reporting module in H2020

Functionalities

Beneficiaries complete on-line their financial statements including the explanations on the use of resources.

Coordinator uploads the Part B of the periodic technical report (narrative part).

Periodic Report in H2020

Components

Part A

- Information entered in the IT tool through the Continuous Reporting module
- Publishable summary (max 2-4 pages) – use layman's terms
- Deliverables, milestones, risks, etc.
- Answers to the questionnaire….etc.

Part B

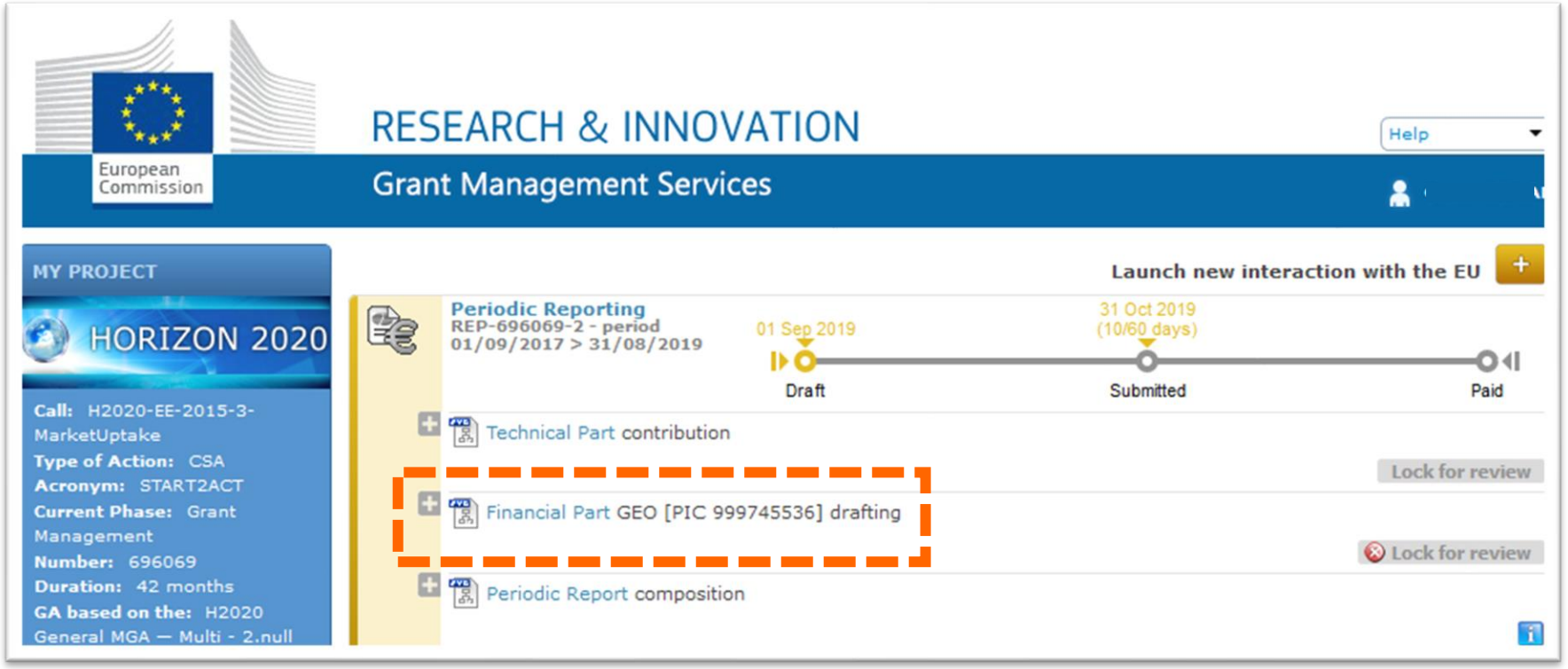
- Explanation of the work carried out by the beneficiaries and overview of progress
- Update of the plan for exploitation and dissemination of results
- Explanations on deviations from DoA
- Impact of the action…etc.

Financial statements

- Individual financial statements
- Explanations on the use of resources and the information on subcontracting and in-kind contributions provided by third parties
- Certificates if necessary at the end of the project

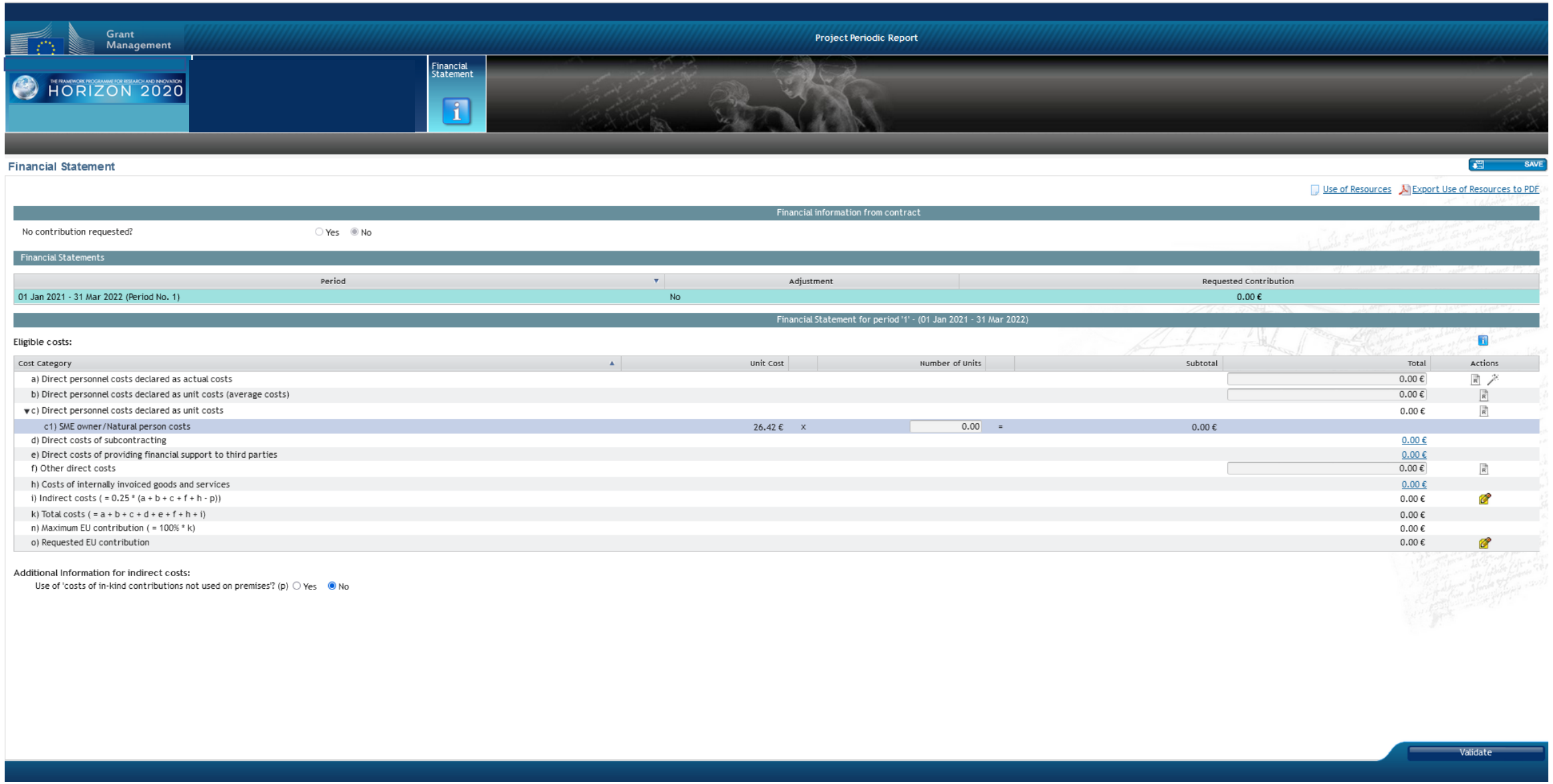
Periodic Report in H2020

Financial Part



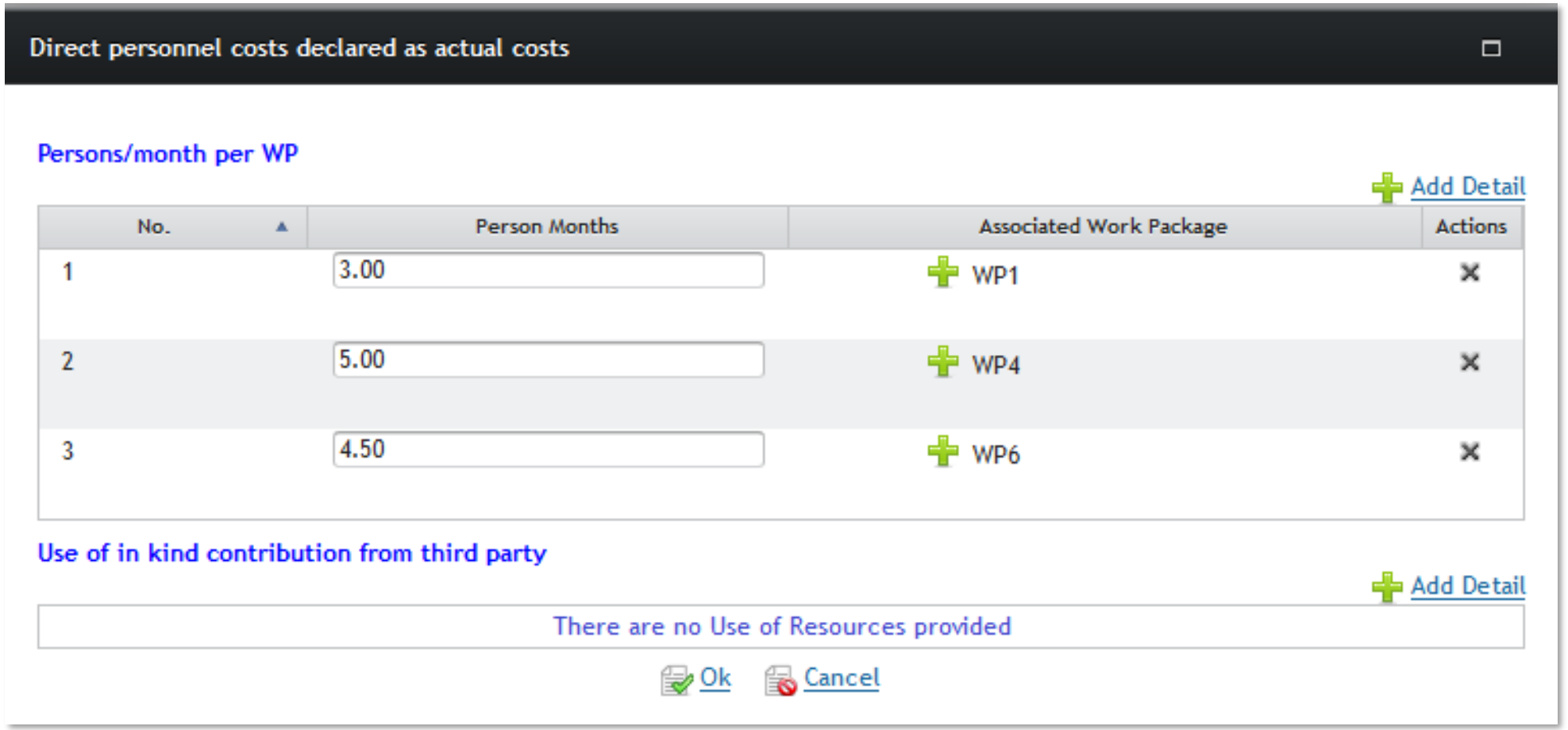
Periodic Report in H2020

Financial Part



Financial Report in H2020

Person Months spent



Financial Report in H2020

Other direct costs

TRAININGS

Other direct costs

Other direct costs (only for actual costs; unit costs are excluded): explanation of major cost items if the amount exceeds 15% of personnel costs.Please give details of major cost items up to the level that the remaining costs are below 15% of personnel costs, starting from the cost items of highest value in terms of cost amount.

It is recommended to specify the Personnel Costs and total amount of Other Direct Costs before filling in the Use of Resources

Add Detail

No.	Costs	Short Description	Category	Associated Work P.	Foreseen in Annex	Explanations (if not for	Actions
1	9,670.44 €	Project Meetings	Travel	WP1	Yes		
2	2,550.33 €	Dissemination material	Other goo	WP6	Yes		
3	14,689.22 €	TLS Hardware and Software	Equipment	WP4	Yes		
TOTAL	26,909.99 €						

Use of in kind contribution from third party

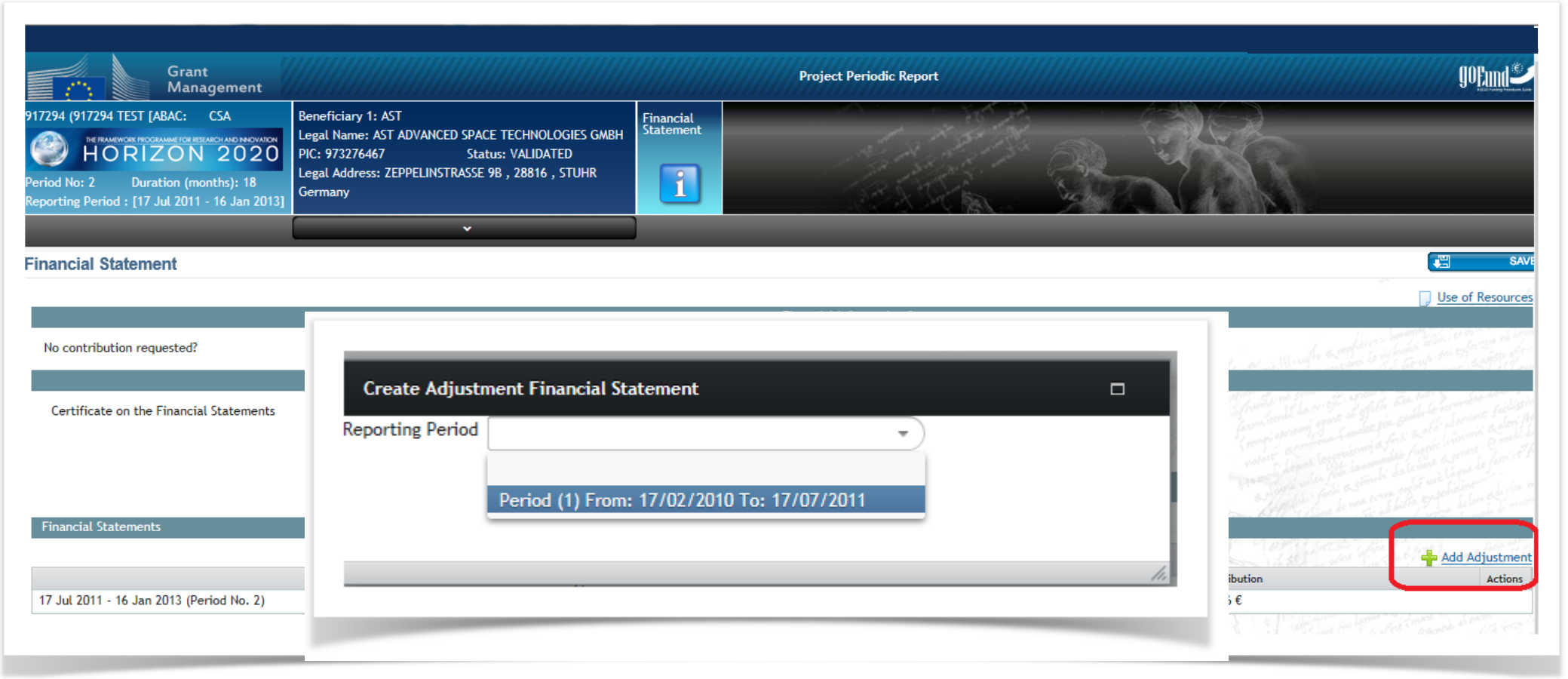
Add Detail

There are no Use of Resources provided

Ok Cancel

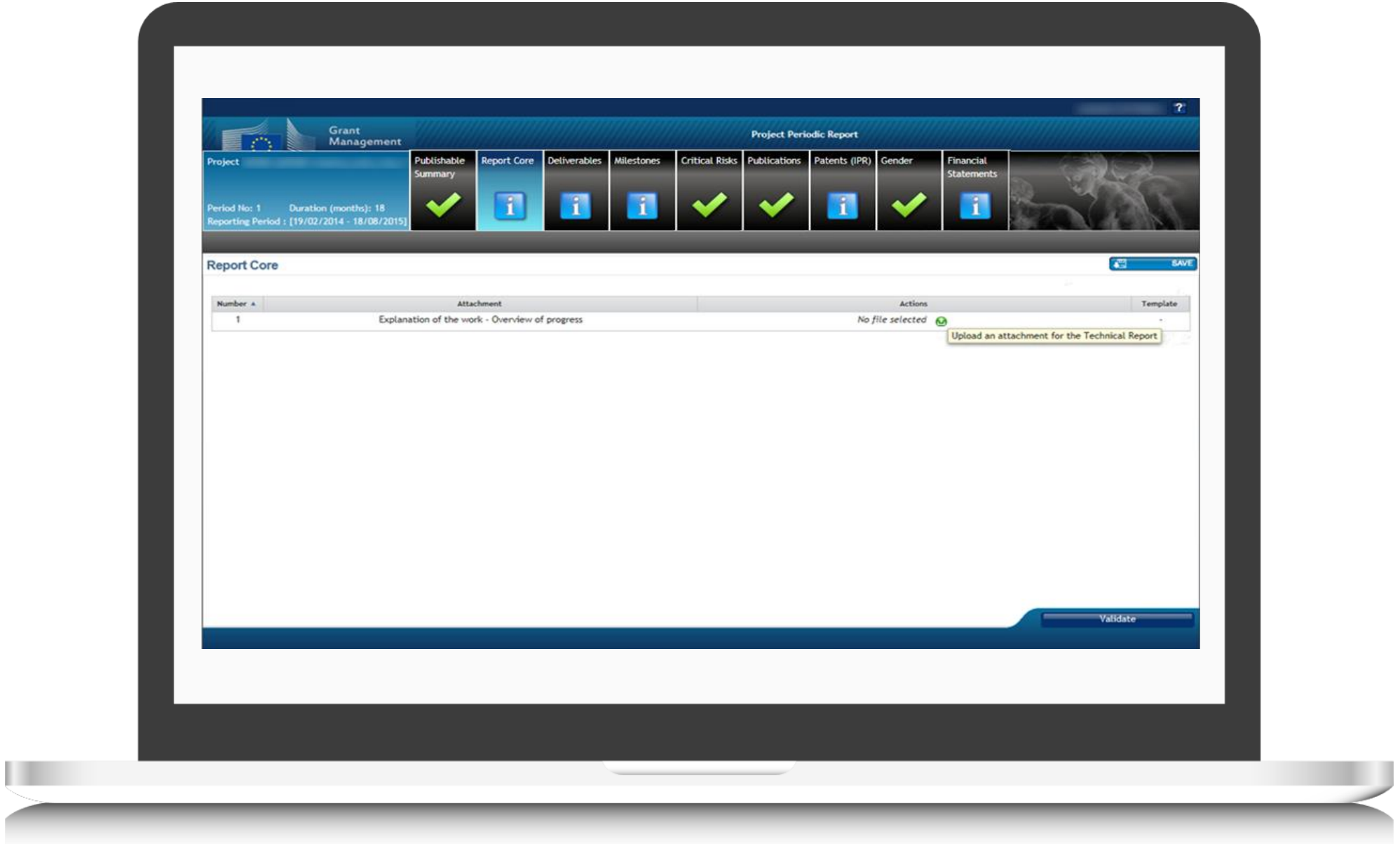
Adjustment in H2020

Financial Statement



Periodic reporting module in H2020

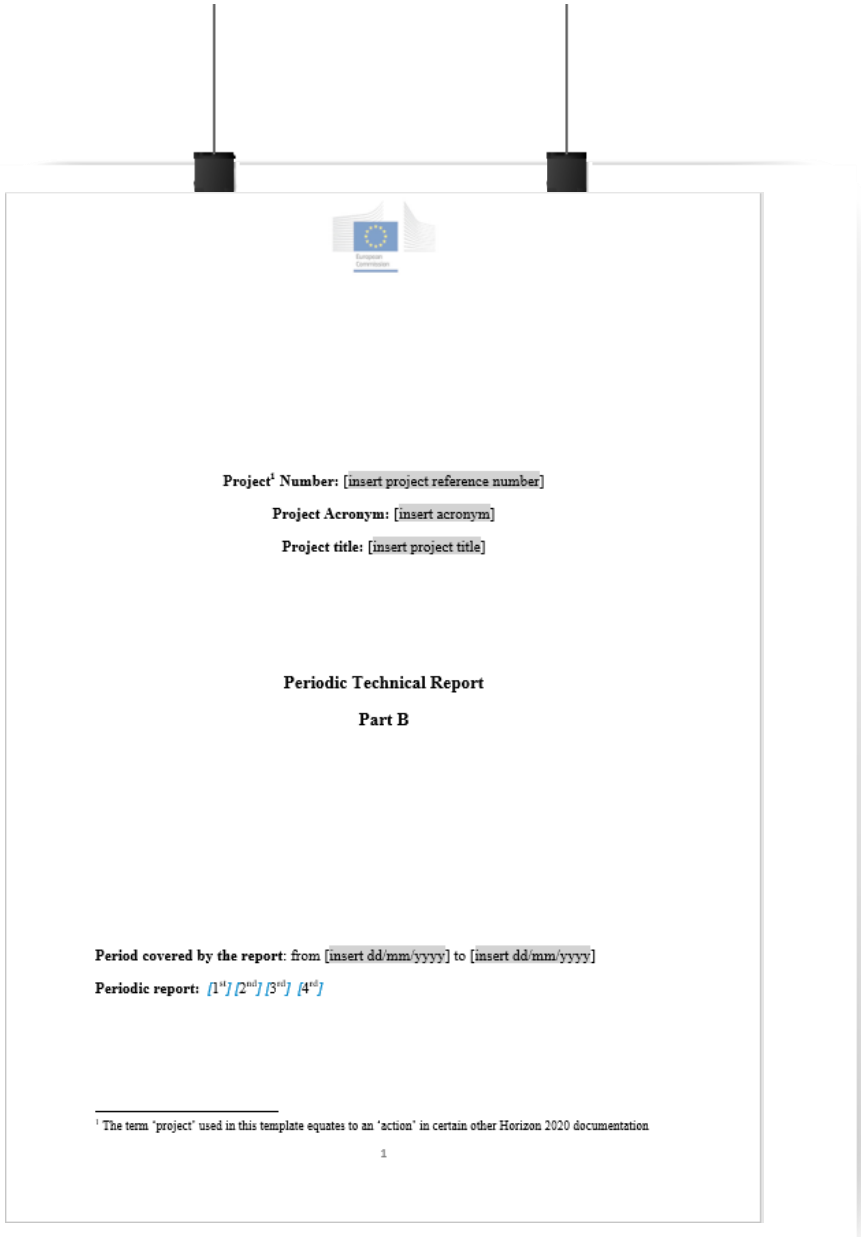
Technical Report



Technical Report in H2020

Template

TRAININGS



Project[1] Number: [insert project reference number]

Project Acronym: [insert acronym]

Project title: [insert project title]

Periodic Technical Report

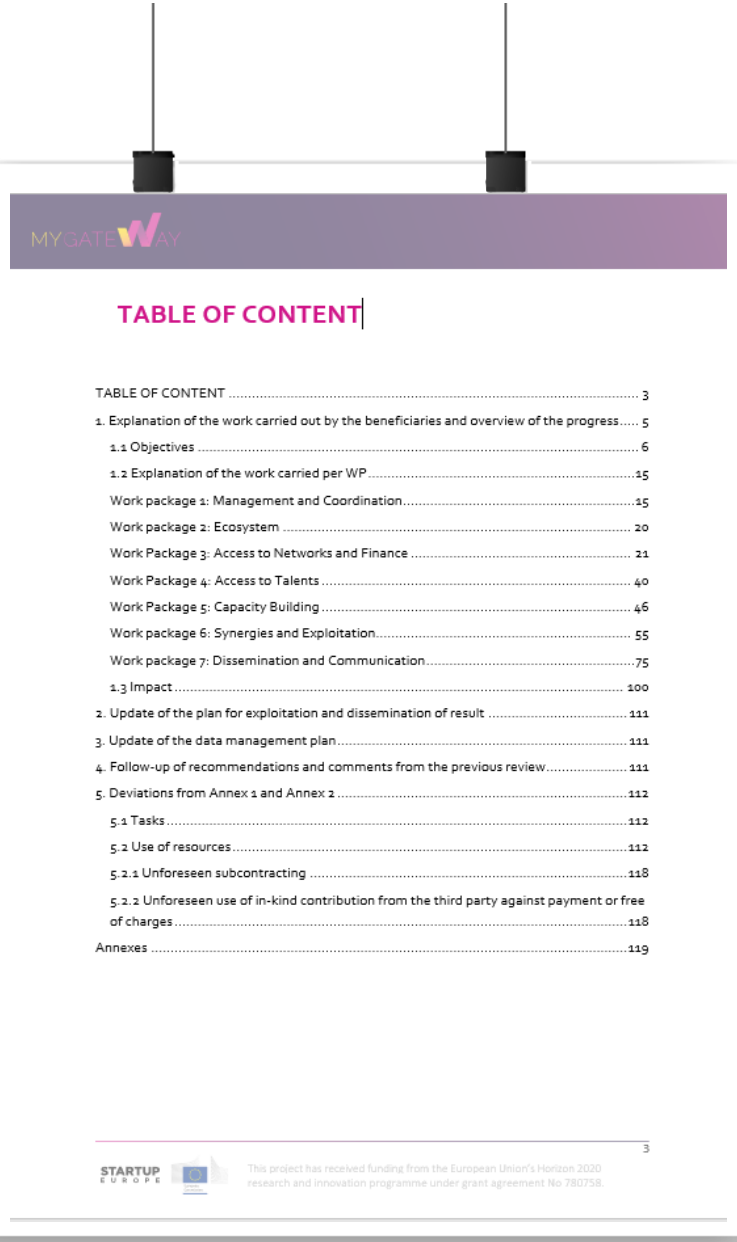
Part B

Period covered by the report: from [insert dd/mm/yyyy] to [insert dd/mm/yyyy]

Periodic report: [1st] [2nd] [3rd] [4th]

[1] The term 'project' used in this template equates to an 'action' in certain other Horizon 2020 documentation

1



MYGATEWAY

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STARTUP EUROPE

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 780758.

How to report deviations?

Section 5. Deviations from Annex 1

5.1 Tasks

- Include explanations for tasks not fully implemented, critical objectives not fully achieved and/or not being on schedule. Explain also the impact on other tasks on the available resources and the planning.

5.2 Use of resources

- Include explanations on deviations of the use of resources between actual and planned use of resources in Annex 1, especially related to person-months per work package.

5.2.1 Unforeseen subcontracting (if applicable)

- Specify in this section:
  - The work (the tasks) performed by a subcontractor which may cover only a limited part of the project;
  - Explanation of the circumstances which caused the need for a subcontract, taking into account the specific characteristics of the project;
  - The confirmation that the subcontractor has been selected ensuring the best value for money or, if appropriate, the lowest price and avoiding any conflict of interests.

5.2.2 Unforeseen use of in-kind contribution from third party against payment or free of charges (if applicable)

- Specify in this section:
  - The identity of the third party;
  - The resources made available by the third party respectively against payment or free of charges
  - Explanation of the circumstances which caused the need for using these resources for carrying out the work.

How to report deviations?

Examples

Tasks related deviations:

- Change in the schedule of the action
- Additional activities
- Attending at event which was not foreseen in the DoA…

Budget related deviations:

- Budget transfer between beneficiaries
- Underestimating PM
- Overspending ….

5. Deviations from Annex 1 and Annex 2

5.1 Tasks

The work plan detailed in the Description of the Action (DoA) remained valid and no critical deviations have been encountered during the 2nd period of . All deliverables were submitted, all milestones were achieved as planned and the Project Officer (PO) was informed in advance of any deviations in submitting from the initial schedule, in particular, the deliverables related to WP4 and WP5.

5.2 Use of resources

has implemented a cost-monitoring system (Internal Financial Reporting) to keep costs under control and in consistency with the achieved results. The overall spending of the project is in line with the work implemented and with the budget foreseen in the Description of Action (DoA). All costs reported by the beneficiaries were carefully checked, needed and justified to achieve the project's objectives.

In particular, the table below provides an overview of the **actual effort (person-months) spent by each project partner during the 2nd period** of in comparison to the efforts included in the DoA of the project.

- **Beneficiary 3:**
  was responsible for Task 4.3 Finding value in university R&D- for creating an entrepreneurial -academic connected ecosystem. spent additional efforts than expected in WP4 (+0.53PM) to gather, harmonize and analyse data from Universities for the Technology Transfer model. Please note that Bar Ilan University requested less EC contribution in order to remain within it foreseen budget.
  Adjustment to RP1: Following the internal revision of the RP1 financial reports submitted an Adjustment to RP1 to correct the travel costs.

- **Beneficiary 4:**
  as the leader of WP3 increased its efforts (+1,6PM - Adjustment to RP1 and RP2) in maximizing the benefits of the startups attended at Startup Ole, by providing matchmaking to our entrepreneurs. The additional effort did not result significant overspending of the foreseen budget.
  Adjustment to RP1: Following the internal revision of the RP1 financial reports submitted an Adjustment to RP1 to correct the other direct costs.

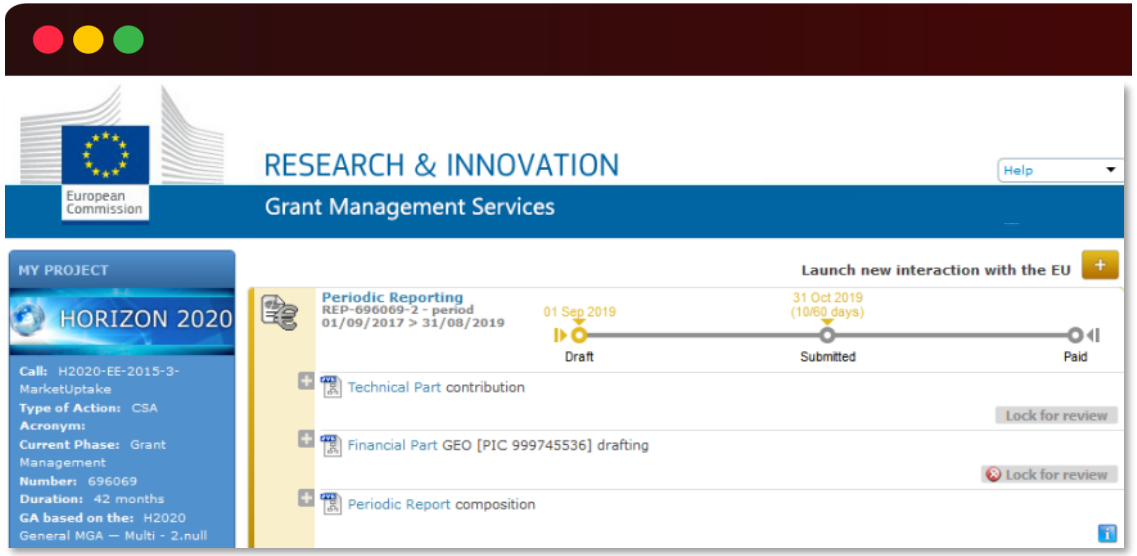
- **Beneficiary 8:**
  spent additional efforts in WP3 (+0.05 PM) with the preparation of the Access2Finance workshop in Bucharest within the iCEE fest. Additional efforts were required in order to harmonize the agenda of the A2F workshop with the overall programme of the iCEE fest. The additional effort spent resulted with minor overspending in terms of financial resources.

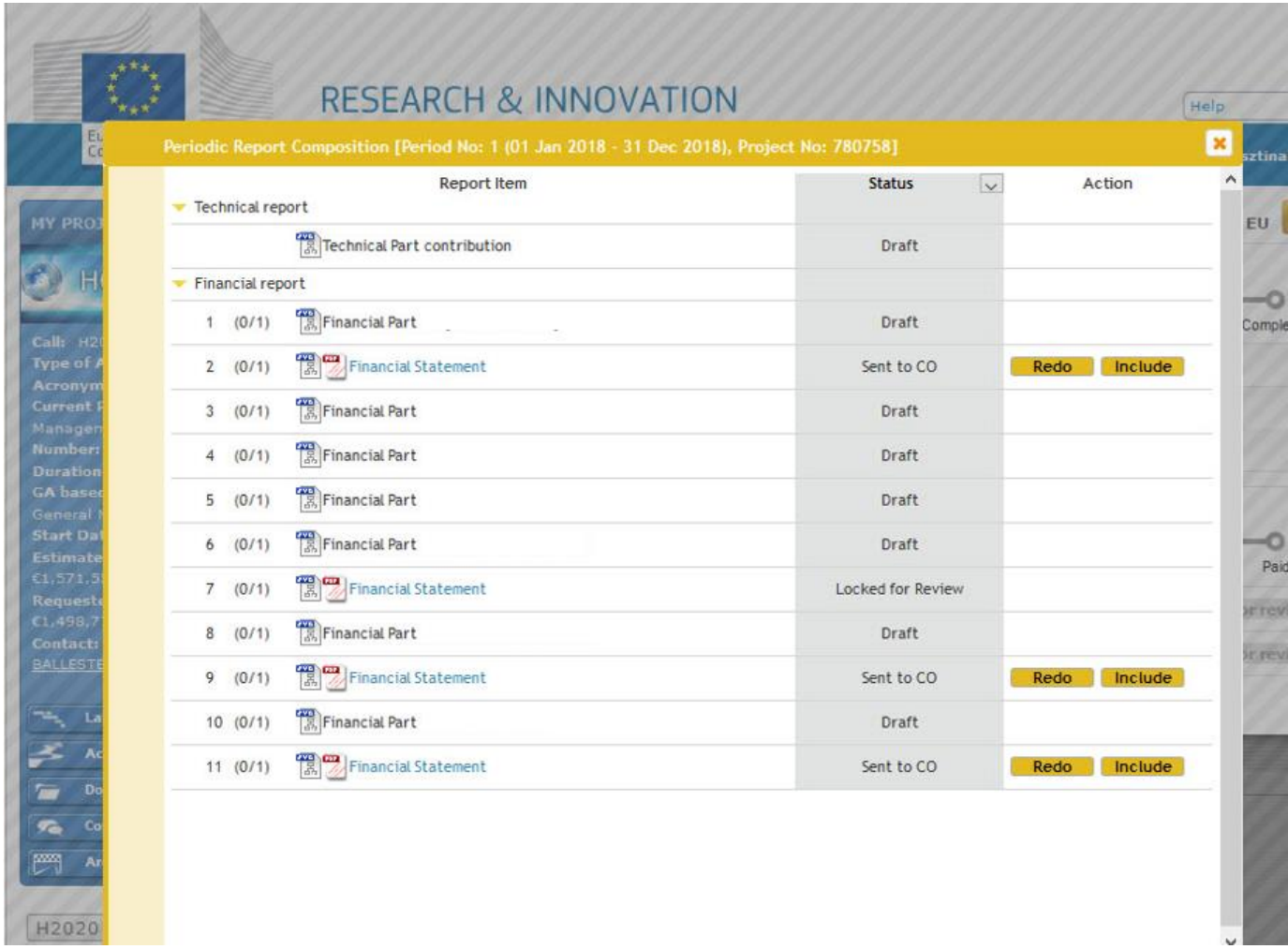
- **Beneficiary 9:**
  spent additional efforts in WP1 (+0.49 PM) related to the increase of administrative efforts within the organisation for arraigning the logistics for the travel of their startups to the MY-GATEWAY events. In addition, reported additional efforts in WP6 (+0.86 PM) due to their increased involvement in the Exploitation plan of the project, specifically defining the strategy for the Startup Europe Networks. Lastly, additional efforts were spent in WP7 (+1.24 PM) for the promotion of the final event, in order to increase the participation of the Slovenian startups at the event. In this respect, it is important to note that the additional effort spent to this end did not result in any overspending in terms of financial resources.

- **Beneficiary 10:**
  Adjustment to RP1: The adjustment to RP1 of the beneficiary was done after the thorough check of declared cost of the project. Findings are related to the Direct Personnel Cost and Other Direct Cost. Considering Direct Personnel Cost it was found out, that some components of the basic remuneration of personnel working on the project was mistakenly accounted (i.e. not considering the portion of working time spent on the project and other activities of an employee). This finding led to

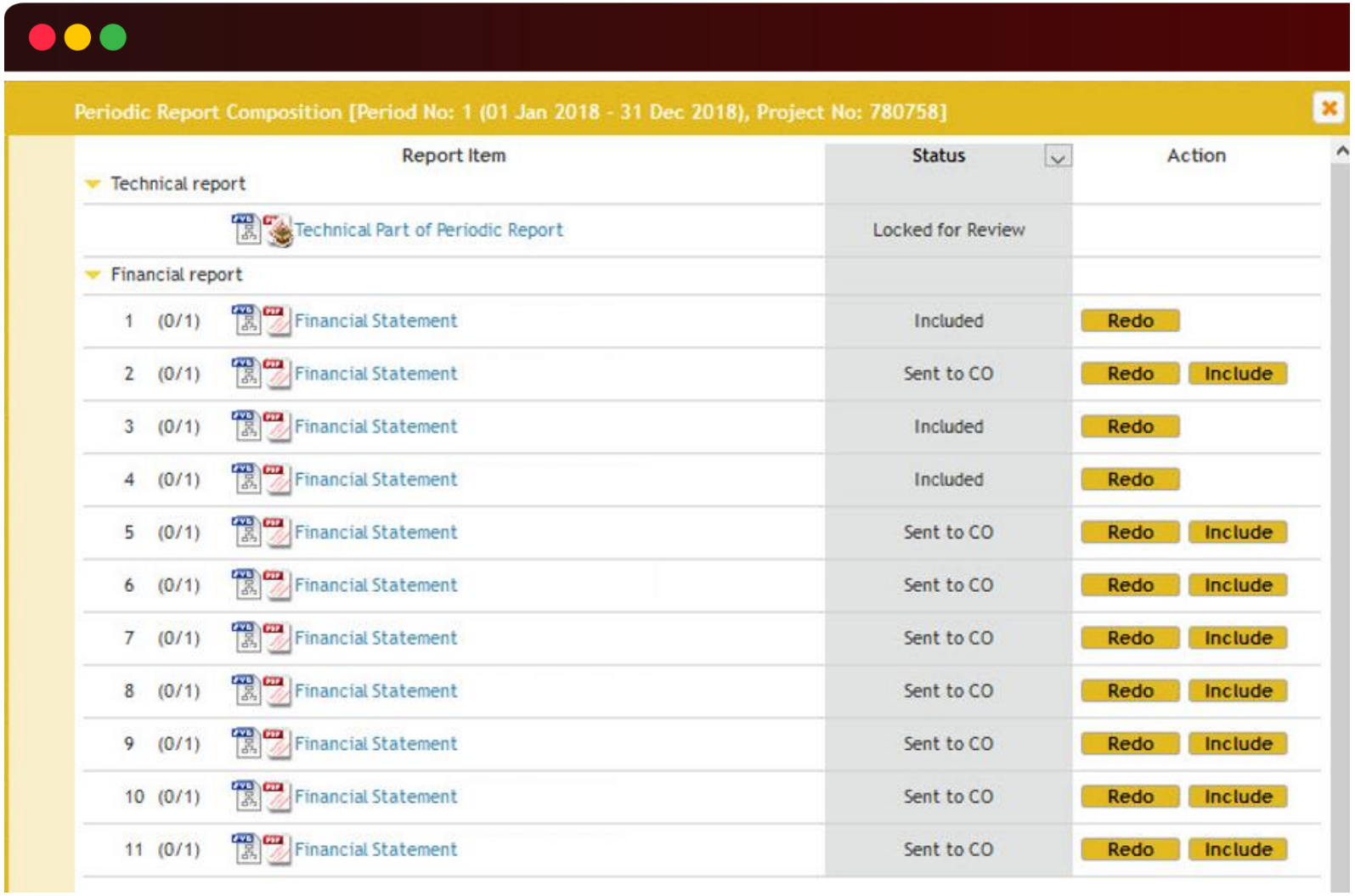
IMPACT OF THE DEVIATION
APPROVAL OF THE PROJECT OFFICER

Submission
of the Periodic Report in H2020





Submission
of the Periodic Report in H2020



Submission
of the Periodic Report in H2020

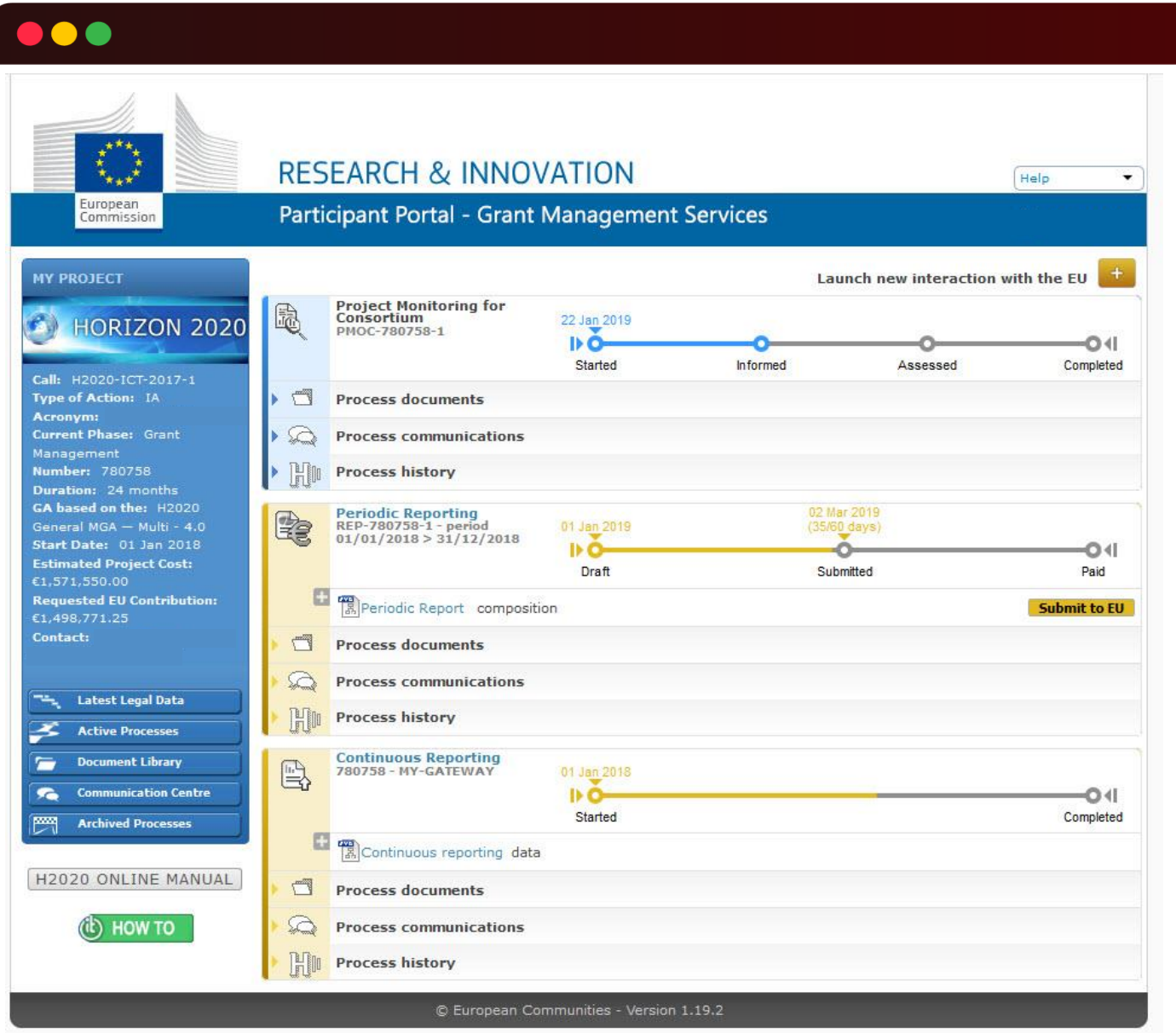
TRAININGS

Please confirm

The beneficiary hereby confirms that:

- The information provided is complete, reliable and true.
- The costs declared are eligible (see Article 6).
- The costs can be substantiated by adequate records and supporting documentation that will be produced upon request or in the context of checks, reviews, audits and investigations (see Articles 17, 18 and 22).
- For the last reporting period: that all the receipts have been declared (see Article 5.3.3).

Ok Cancel



EU assessment

of the Periodic Report and the Payment in H2020

Suspension of the payment deadline letter

- You have to (re)submit the updated reports/requested information via your Participant Portal account — within 30 days /15 days (last period) from receiving this letter.
- Suspension will be lifted (and the remaining payment period will continue to run again) once all issues have been resolved.

Interim payment information letter / Payment of the Balance

Letter to Coordinator

- The coordinator will be notified of the end of the payment process and will receive a payment letter and the supporting reports with the details of any cost rejected and the reasons for rejection.

Final Report

Technical Report in H2020

- For the final reporting period, the coordinator must submit, in addition to the periodic report, the final report **within 60 days of the end of the final reporting period.**
- The final report **covers the whole project** and is composed of a final technical and a final financial part:
- **Final technical report** is a publishable summary of the entire project
  - Summary of the context and overall objectives of the project (For the final period, include the conclusions of the action)
  - Work performed from the beginning of the project to the end of the period covered by the report and main results achieved so far (For the final period include an overview of the results and their exploitation and dissemination)
  - Progress beyond the state of the art and expected potential impact (including the socio-economic impact and the wider societal implications of the project)
  - Project logos, diagrams, photographs and videos illustrating its work (if available).

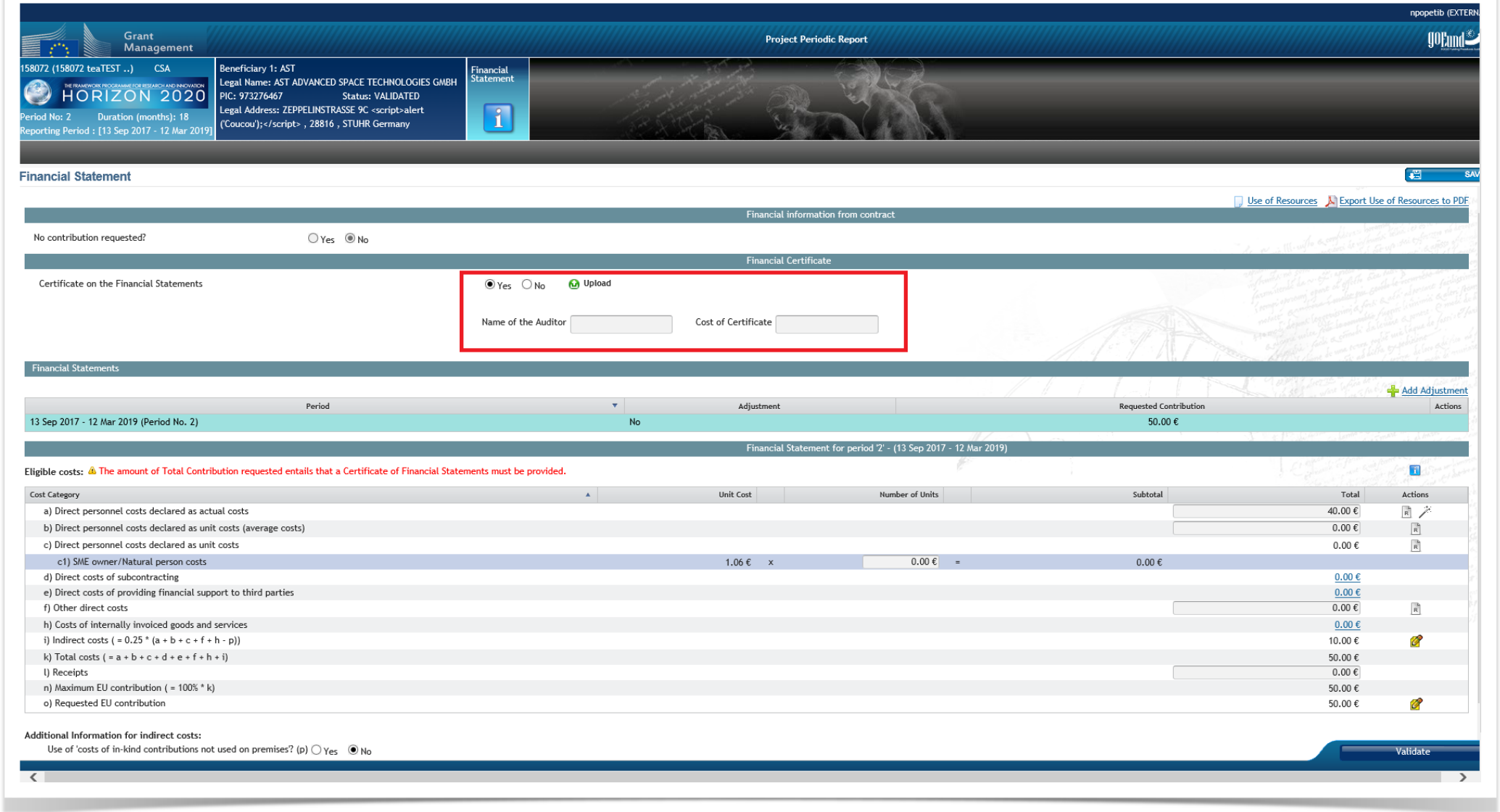
Final Report

Financial Report in H2020 and HE

- **Final summary financial statement** that is automatically created by the system (consolidating the data from all individual financial statements for all beneficiaries and linked third parties, for all reporting periods) and that constitutes the **request for payment of the balance**.
- In some cases it must be accompanied by a **certificate on the financial statements - CFS** (one certificate per beneficiary/linked third party).
- It is required if a **beneficiary/linked third party requests a total financial contribution of €325,000 or more**, as the reimbursement of actual and unit costs calculated on the basis of its usual cost accounting practices. In HE **€430,000;** or €725.000 for those having a **System and Process Audit**
- The certificate **must be issued by an external auditor**.

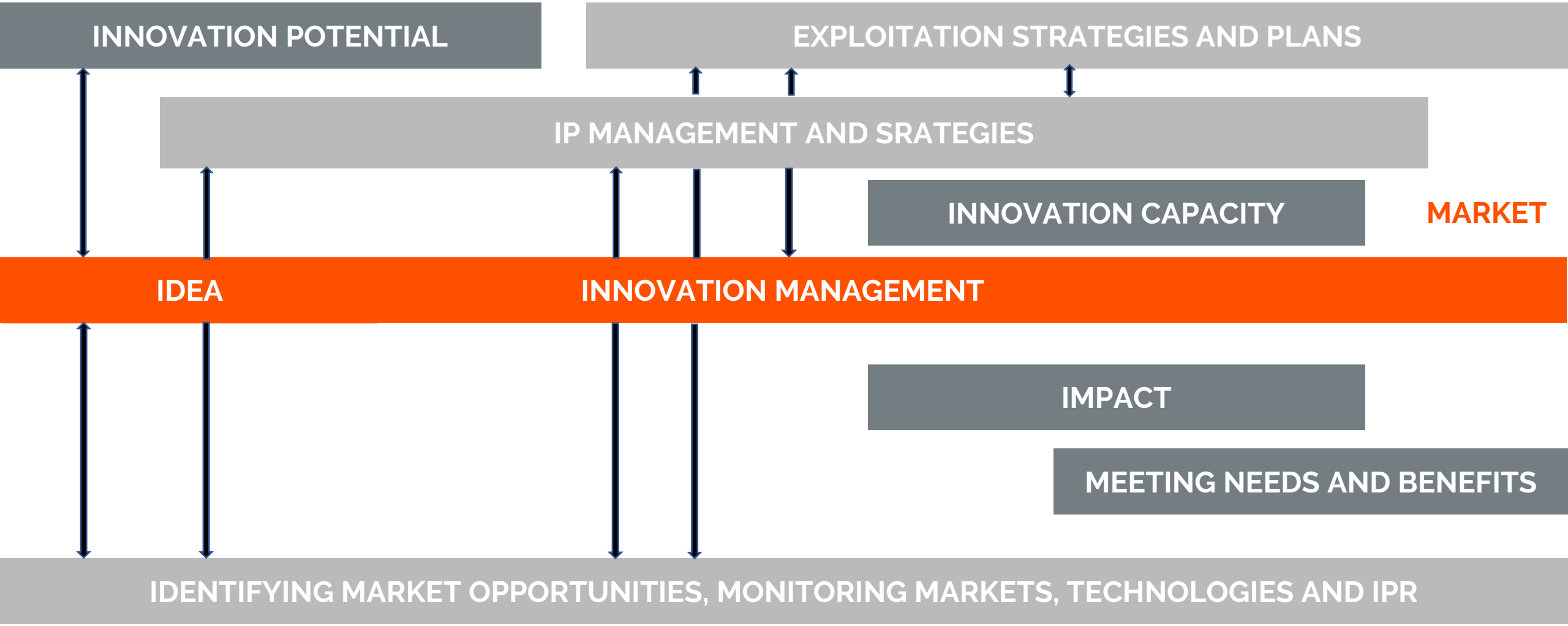
CFS

Financial Statement



Exploitation and innovation management processes

Innovation management

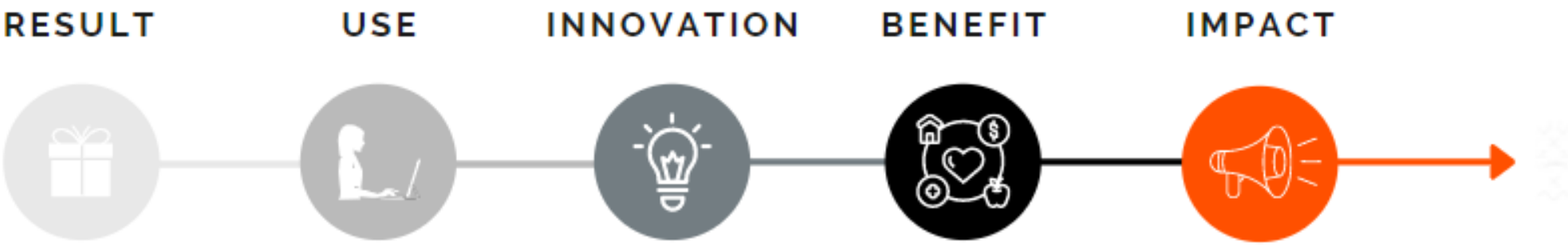


Source: IPR Helpdesk

Exploitation and innovation

From idea to market

- Focus on impact and innovation > producing research results
- Consortium must plan to use the results to make innovations
- Innovations need to address the call challenges and contribute to the related impact
- Innovation and impact must be managed in all stages of the project based on how it was addressed in the proposal



Dissemination and exploitation

What's new in Horizon Europe?

D&E + Key Impact Pathways to demonstrate the contribution to the impact on society

Improvement on proposal/reporting templates for more D&E specific language

Emphasis on D&E in continuous reporting (even after the end of the project)

Encouragement of third-party exploitation (where relevant)

Introduction of incentives and tools for exploitation

IP Management
TO DO

- **Monitor** the development of the results
- **Capture** the results generated by the project
- **Ownership** regimes
- **Assess and evaluate** the IP
- **IP protection**
- **Market and competitor** watch and analysis
- **Exploitation:** get the results used
- **Dissemination:** talk about the results

Capture the results

How to…

IP Note

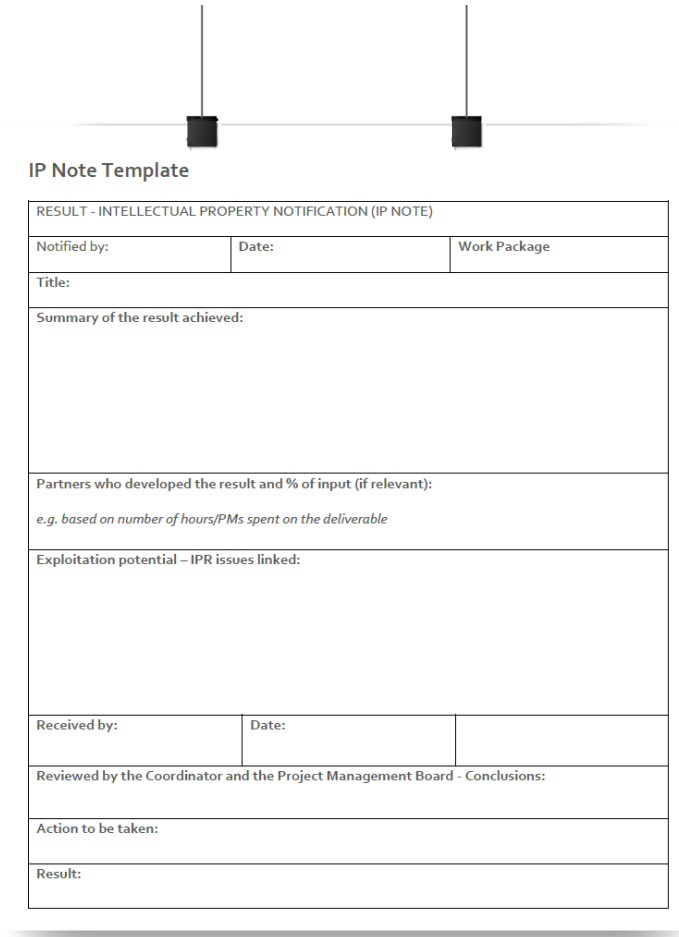
- Whenever a new result is developed, the author will have to fill out an IP Note and send it to the coordinator
- Will support the body/partner in charge (e.g. Steering Committee, Exploitation Manager) to decide on the need for protection

Invention Disclosure Form

- Description of the invention including the list of research sponsors and any supporting document/background
- **(!)** this document is confidential

Review deliverables and reports

One-to-one sessions with beneficiaries



IP Note Template

RESULT - INTELLECTUAL PROPERTY NOTIFICATION (IP NOTE)		
Notified by:	Date:	Work Package
Title:		
Summary of the result achieved:		
Partners who developed the result and % of input (if relevant): *e.g. based on number of hours/PMs spent on the deliverable*		
Exploitation potential – IPR issues linked:		
Received by:	Date:	
Reviewed by the Coordinator and the Project Management Board - Conclusions:		
Action to be taken:		
Result:		

CONFIDENTIAL

Invention Disclosure Form

ffice

TITLE OF INVENTION

INVENTOR(S)

(s) that she/ he is the author(s) of the invention fully described below, and dge there are no other persons with a claim to co-authorship. (Inventors: antial contribution to the invention)

	2	3	4
Date			

FUNDING OF THE INVENTION

Project :

Other:

PERSONAL DETAILS OF THE INVENTOR(S)

	1	2	3	4
Name				
Phone number				
E-mail				
Employer				

Assess and evaluate the IP

Technology and market assessment

- **Assessment of foreground IP**
  - Prior search for patentability
  - Search in patents (Espacenet; European Patent Register - Alert)
  - Search for trademarks and design (EUIPO eSearch Plus)
  - Search in standards (CEN-CENELEC)
- **Market analysis**
  - Technical reports
  - Company websites, annual reports (incl. financial)
  - Market reports
  - Industry partners
- **Competitor/technology analysis**
  - Market size, segmentation, growth potential
  - Market share, competitors' current and future plans
  - Other technical solutions
  - Potential barriers and obstacles

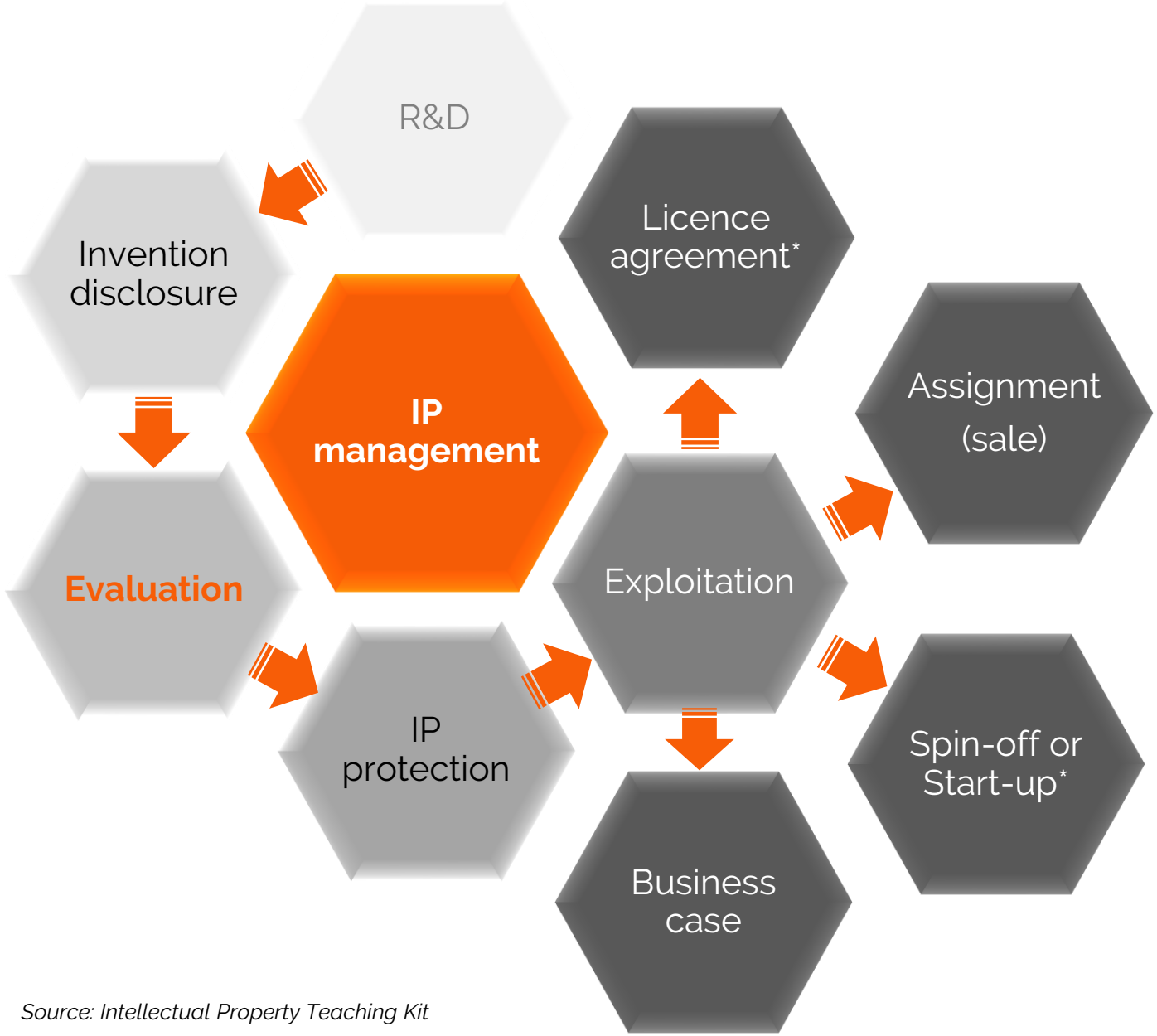
IP Protection

One product, many IP protection routes

IP protection	Product type
Patent	Any invention, product or process that offers a new way of doing something or provides a new solution to a problem
Utility model	Minor inventions or minor improvements of existing products
Design	Literary and artistic works: music, books, paintings, computer programmes, databases, etc. Ornamental or aesthetic aspects of a product
Trademark	Any sign capable of distinguishing your goods or services from your competitors'
Copyright	Literary and artistic works: music, books, paintings, computer programmes, databases, etc.
Trade secret	Any information that is not generally known, confers a competitive edge and is subject to reasonable efforts to maintain its secrecy

Exploitation routes

- Decide on **how to commercialise your IP:**
  - By its IP owner
  - Through assignments
  - By business partners (e.g. licencing, Joint venture and spin-offs)
- Update the **Plan for the Exploitation and Dissemination of Results**
- Include into the Final Plan for the Exploitation and Dissemination of Results / Business Plan
- **Report the exploitation activities to the EC** – see above in the Continuous Reporting section.



Source: Intellectual Property Teaching Kit

Joint Ownership Agreement

- Signed between co-owners of IP
- Ideally during CA preparation or as soon as joint IP is detected
- In order to define in detail the rules governing joint ownership
- Particulars
  - Shares: assignment of shares within the joint ownership
  - IP management: responsibilities for filing and maintaining (including the costs incurred) of the IP rights
  - Protection of rights: obligation imposed on all participants to monitor and report any infringements of the foreground; indication of the partner empowered to conduct legal actions for protection of the foreground
  - Conditions of the use of the foreground: Use in further research; Individual exploitation; Licensing; Transfer
  - Additional clauses: standard contractual matters, i.e. applicable law, jurisdiction or alternative dispute resolution systems

EC tools to boost your exploitation efforts

Horizon Results Booster

D&E – Business planning – Go to Market

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.**

https://www.horizonresultsbooster.eu/

Horizon IP Scan

Helping SMEs valorise IP in R&I projects

= launched in 2021, a new (pilot) service of the EIC and SME Executive Agency (EISMEA). The service supports European startups and other SMEs involved in EU-funded collaborative research projects to efficiently manage and valorise IP in collaborative R&I efforts

- Builds on an EU-wide network of IP experts providing tailored support and recommendations
- It will be delivered either by a private IP professional (patent or IP attorney) or otherwise qualified IP experts, such as specifically trained staff from a national IP office or an innovation agency
- Three major steps:
  - a preparation phase including a pre-interview
  - a main interview, which is done in an in-person or online meeting
  - provision of an individual report and recommendations
- Who can apply?
  - European start-ups and SMEs that are about to sign a Horizon (2020/Europe) GA or have recently signed one (up to 6 months after signature)
  - SMEs signposted by the Horizon Results Booster (maximum until half of the project duration)
  - SMEs that are referred to Horizon IP Scan by the Enterprise Europe Network in view of a planned cooperation with other entities on a R&I project, up to 6 months after the beginning of a project, but preferably before any agreement is signed

https://intellectual-property-helpdesk.ec.europa.eu/horizon-ip-scan_en

European IP Helpdesk

Capacity building & help in managing your IP

- The European IP Helpdesk supports European SMEs and research teams involved in cross-border business and/or EU-funded research activities manage, disseminate and valorise their IP
- Offering a broad range of informative material, a Helpline service for direct IP support as well as on-site and online training, our main goal is to support IP capacity building along the full scale of IP practices: from awareness to strategic use and successful exploitation
- Are you active in other regions such as India, China, Latin America or South- East Asia? Visit the regional IP Helpdesks: https://intellectual-property-helpdesk.ec.europa.eu/regional-helpdesks_en

Helpline

Looking for someone to address with your IP questions?

Training

IP capacity building: webinars and e-learning

IP resources library

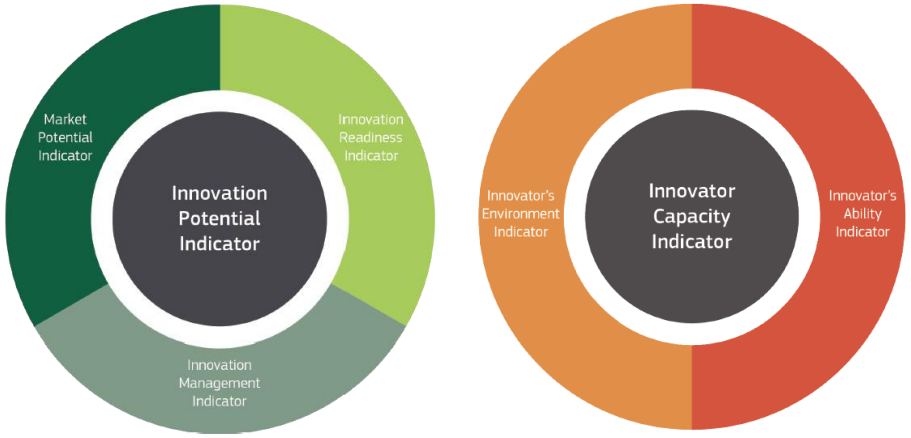
Variety of hands-on, user friendly and easy-to-read publications such as guides, Bulletins, fact sheets or case studies.

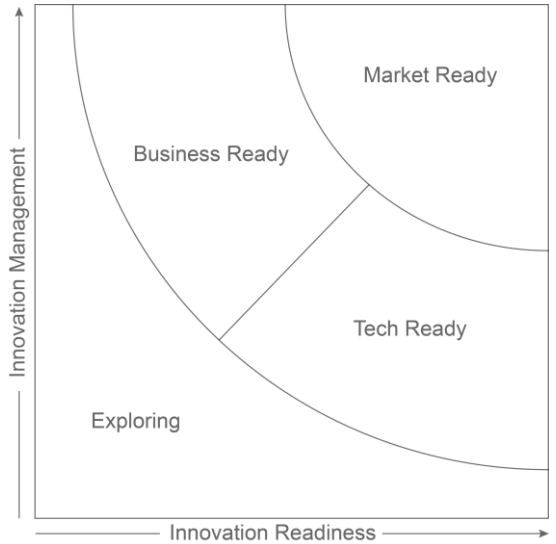
Innovation Radar

For cutting-edge EU-funded innovations

= a European Commission initiative to identify high potential innovations and innovators in EU-funded R&I projects

- Builds on the information and data gathered by independent experts involved in reviewing ongoing projects funded by the EU. These experts also provide an independent view regarding the innovations in the projects and their market potential
- Supported by Dealflow.eu which delivers support to high potential innovators identified by Innovation Radar





Innovation Radar

For cutting-edge EU-funded innovations

SMART & SUSTAINABLE SOCIETY INNOVATION

Novel chemistries of poly-vinyl ester resins formulations for improving fibre bridging

SHARE:

Market Maturity: **Market Ready**

These are innovations that are outperforming in innovation management and innovation readiness, and are considered to be "Ready for the market". Learn more →

Market Creation Potential

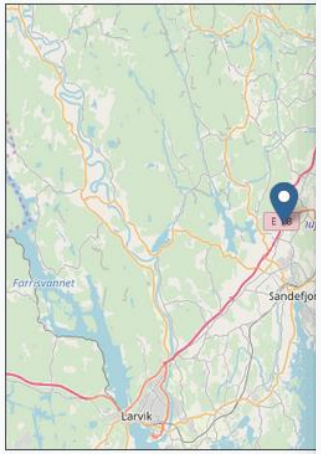
This innovation was assessed by the JRC's Market Creation Potential indicator framework as addressing the needs of **existing markets and existing customers**. Learn more →

Go to Market needs

Needs that, if addressed, can increase the chances this innovation gets to (or closer to) the market incude:

- Prepare for Market entry
- Scale-up market opportunities

Location of Key Innovators developing this innovation



Key **Innovators**

POLYNT COMPOSITES NORWAY AS

SANDEFJORD, NO
Large Enterprise

1 innovations

The EU-funded Research **Project**

This innovation was developed under the Horizon 2020 project **DACOMAT** with an end date of 31/12/2021

- Read more about this project on **CORDIS** →
- Details of this project on the **Horizon 2020 dashboard** →

Description of Project DACOMAT

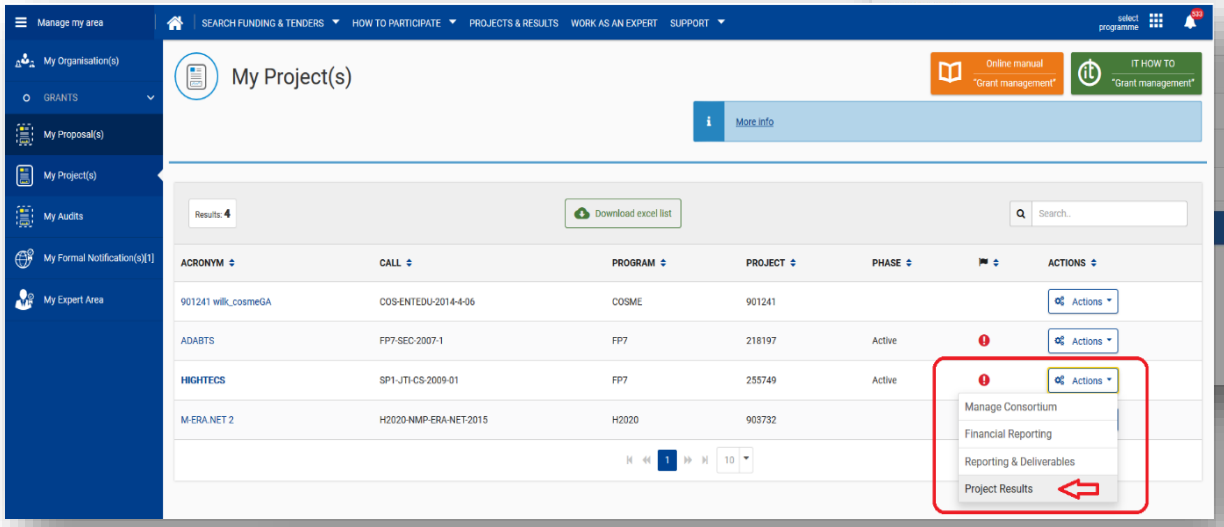
Society is dependent upon the continuous functioning of critical infrastructures such as road bridges and energy supply. These infrastructures are exposed to high loads and harsh environmental conditions through their lifetime in operation and materials failures lead to down time having vast negative effects on productivity and well-being in society in terms of lost time, shortened life cycles and increased service costs. So engineers face the challenge to develop durable materials compatible with industrial standards in an economically viable way. Composites represent attractive materials and are increasingly used for such applications since they demonstrate low weight, high strength and stiffness and high environmental resistance. However composites suffer from sudden brittle failure mainly due to production defects and handling damages; this is currently handled by strict quality and process control from manufacturers, resulting in high production costs which can represent a barrier to introduction and development of composites in a wide range of applications. The general objective of DACOMAT is to develop more damage tolerant and damage predictable low cost composite materials in particular aimed for used in large load carrying constructions like bridges, buildings, wind-turbine blades and off shore structures. The developed materials and condition monitoring solutions will enable composite structures to be designed and manufactured as large parts allowing for more and larger manufacturing defects and the need for manual inspection to be dramatically reduced. A demonstration of the materials' performances in relevant environment will be conducted in two business cases: wind turbine blades and road bridge beams, while both LCC and LCA analysis will also strengthen the project's credibility.The project gathers the full industrial value chain: ranging from materials development and manufacturing to composite parts demonstrators and standardisation.

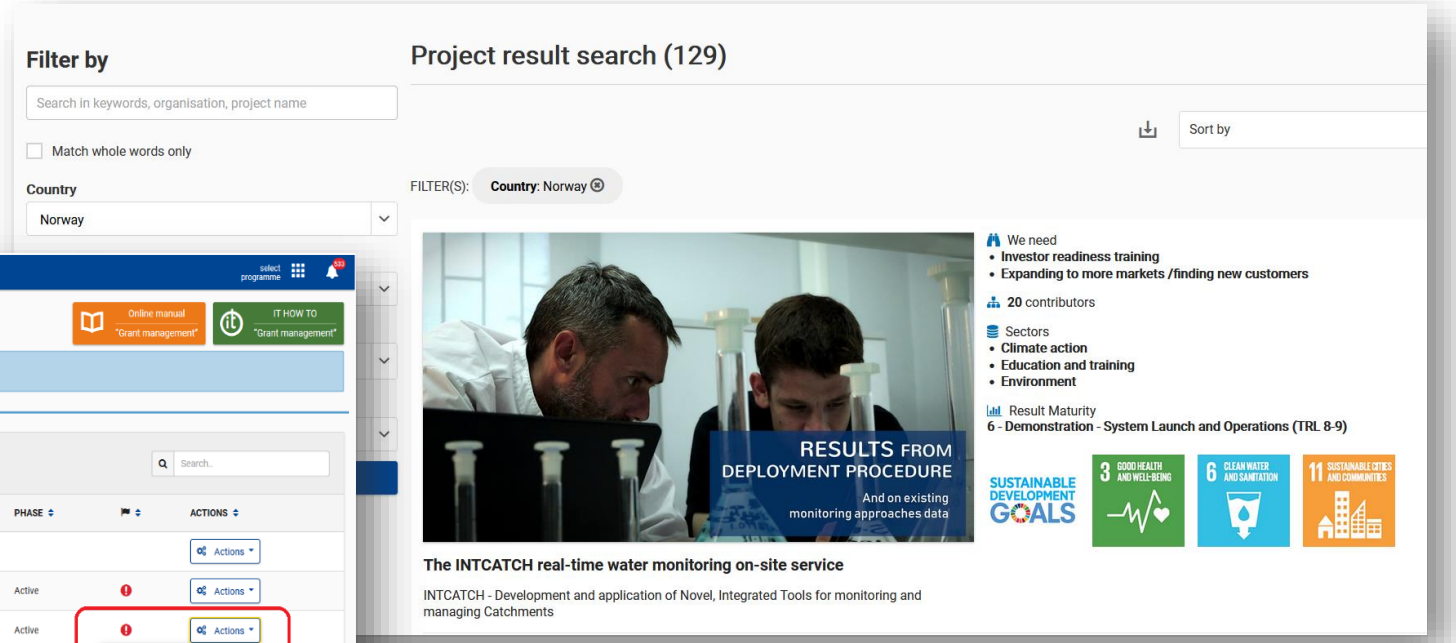
Innnovation Radar's analysis of this innovation is based on data collected on 13/03/2021.

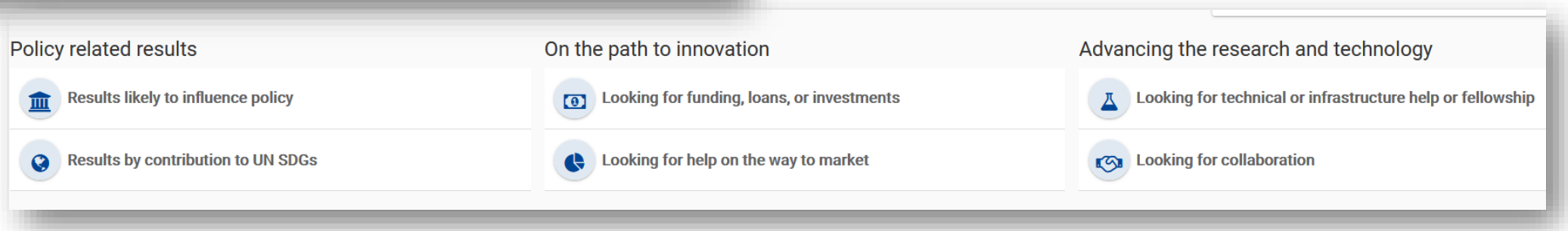
https://www.innoradar.eu/

Horizon Results Platform

Promote the exploitation of your results







https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/horizon-results-platform

EIC Business Acceleration Services
& the EIC Community Platform

Under Horizon Europe, the EIC support goes beyond funding, and it aims at accelerating EIC innovations and growth of top deep tech companies. To leverage further EIC investments, as EIC supported researcher, innovator or entrepreneur you will have access to a range of tailor-made EIC Business Acceleration Services.

On the EIC Community Platform you can:

- Access Business Acceleration Services like coaching and matchmaking events
- Explore business opportunities and expand your business network
- Co-create knowledge and self-organise online events and learning opportunities
- Get support from peers and the EIC eco-system, share experience and start discussions
- Expand networks with EIC ecosystem partners
- Share your experience and get support from peers via horizontal and thematic groups
- Co-create ideas and knowledge
- Promote interesting other events to the EIC Community

EIC Business Acceleration services:

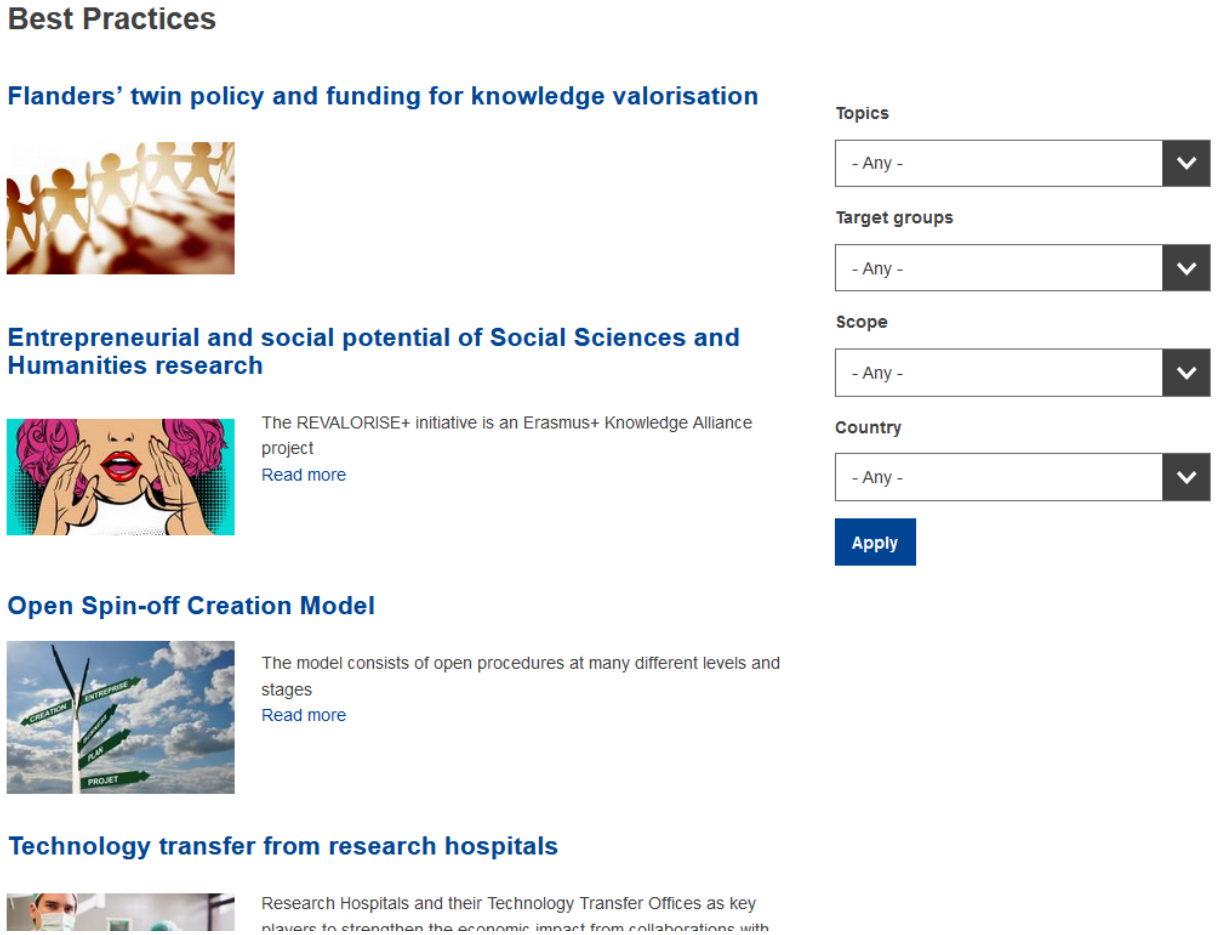
- **EIC Corporate Programme** bridge the gap between EIC-funded companies and large corporates so they collaborate and develop new business models and opportunities
- **EIC Investor Programme** and e-pitchings are exclusive European pitching and networking events gathering venture capitalists, business angels and other finance partners with the aim to help EIC companies finding their next funding opportunity
- **EIC Innovation Procurement Programme** bring together innovators with procurers to exploit deep tech innovations through early market consultation and thematic procurement scouting activities
- **EIC Community Talks and Trainings** gather together EIC Community members for experience sharing and peer-learning workshops (including for the EIC beneficiaries at an earlier stage of innovation life cycle)
- **EIC Coaching:** Get access to tailored coaching available throughout your project. Selected coaches are active in the community supporting regularly beneficiaries on business development, organisational development and finance
- **EIC Pathfinder Programme** brings together early-stage researchers and SMEs (Pathfinder and Transition beneficiaries) and offers them the tools to bring their innovation to the market by leveraging entrepreneurial skills and promoting early access to market and investment opportunities

https://eic.eismea.eu/community/

Knowledge Valorisation Platform

To transform research results into products and solutions

- The Knowledge Valorisation Platform connects players in the EU with the common goal to transform the excellent research results and data we produce in Europe into sustainable products and solutions for the benefit of all - be it economic prosperity, environmental benefits, societal progress or improved policy making.
- The platform provides a space for stakeholders to share best practices and establish contacts, to exchange experiences and co-design guidance, and to stay connected to EU developments in knowledge valorisation. The aim of the platform is to ultimately improve policies and enhance capacities and skills.
- Read more about the EU's knowledge valorisation policy



https://ec.europa.eu/info/research-and-innovation/research-area/industrial-research-and-innovation/eu-valorisation-policy/knowledge-valorisation-platform_en

QUESTIONS?

thank you

for your attention

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