

Intellectual Property & Horizon 2020:
Write a Better Proposal, Manage a Successful Project
Session 6: The Plan for Exploitation and
Dissemination of Results (PEDR)

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What is the PEDR?

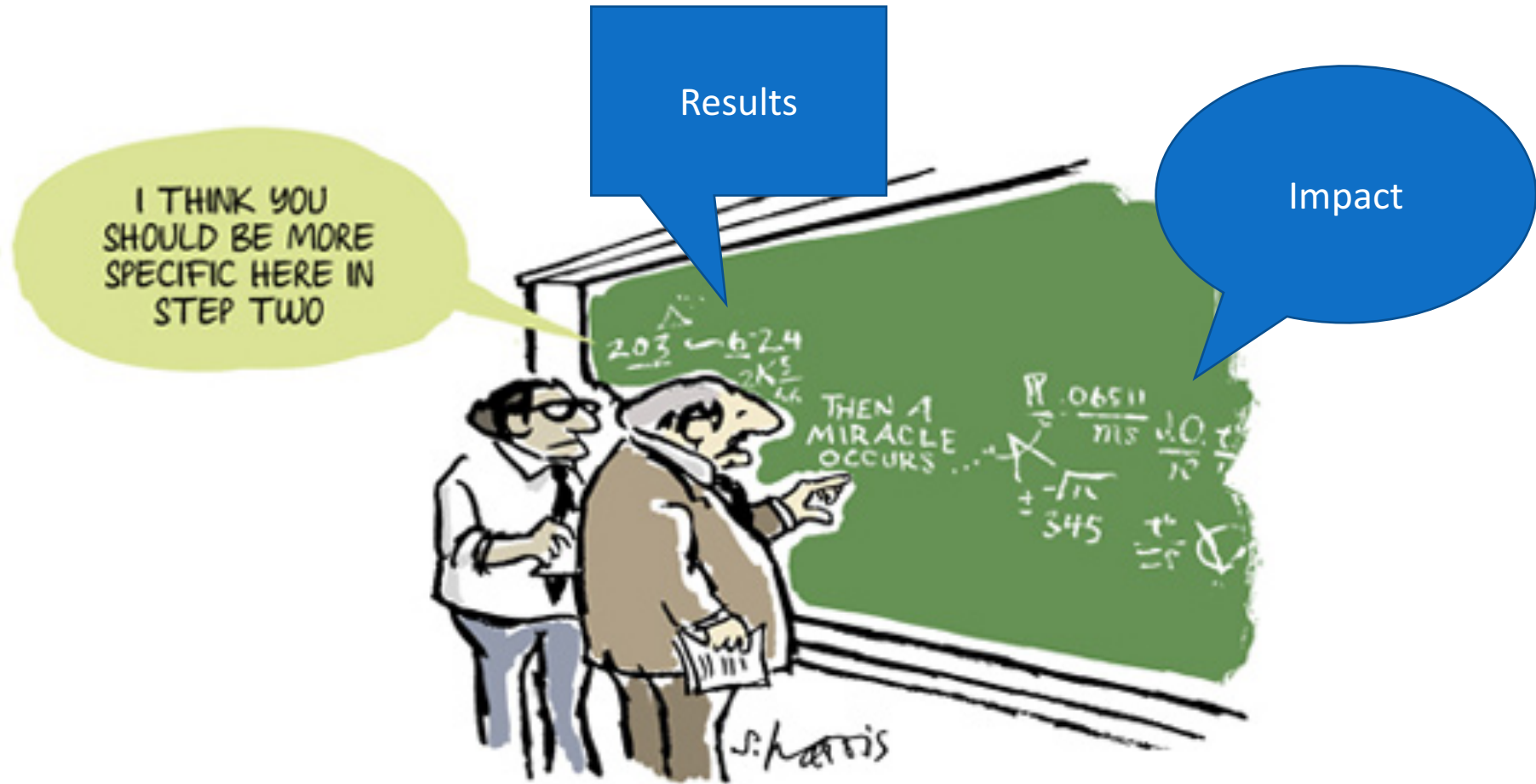
A summary of

- Strategy
- Concrete actions

related to the

- protection
 - dissemination and
 - exploitation of the project results.
- follows the evolution of the project from the proposal until the submission of the final project report
 - included into Annex 1 to the grant agreement

PEDR: Measures to maximise impact of Results



Starting points: Objectives and Impact

H2020 Your call: Specific Objectives

e.g. to increase business and industry relevant research and innovation capacity within two target sectors: ‘Health & Life Sciences’ and ‘Renewable Energy’.

The **impact** of the action will be measured by the Result Indicator:

- Publications? Products and services? Employment?
- Check the indicator carefully

PEDR: Plan for Exploitation and Dissemination of Results

Address as a minimum:

- What kind of needs does the project respond to?
- What kind of problem the proposed solution will solve and why this solution will be better than existing ones and in which areas?
- What new knowledge (results) the project will generate (assessment of the state of the art)?
- Who will use these results?
- What benefits will be delivered and how much benefit?
- How will end users be informed about the generated results?

PEDR will form part of Annex 1 to grant Agreement if project is funded.

PEDR: Measures to maximise impact



Describe a credible path to deliver the innovations to the market:

- proportionate to the scale of the project,
- containing measures to be implemented both during and after the project.

➤ Dissemination and exploitation measures should address the full range of potential users and uses including:

- research, commercial, investment, social, environmental, policy making, setting standards, skills and educational training.
- The approach to innovation should be as comprehensive as possible, and must be tailored to the specific technical, market and organisational issues to be addressed.

Explain how the proposed measures will help to achieve the expected impact of the project.

Case Study/ Discussion

A H2020 consortium involving a university partner and an enterprise have prepared a proposal in the automotive field. The objective of this H2020 call is to improve the competitiveness of enterprises with additional value for 'people and planet'. The Results indicator is partly measured in the number of peer reviewed papers published and the number of new products and services brought to market.

The enterprise is an 'OEM' ('Original Equipment Manufacturer'). They manufacture and supply Exhaust Gas Temperature (EGT) Sensors and associated software for engine management systems to global automotive companies. The university focuses mainly on teaching and research

Under the project proposal they have the following individual work packages:

WP5: Development of a novel EGT sensor

Anticipated WP Results: A car engine sensor offering a totally new feature which is very different from existing sensors and can be used in industry. The sensor will help reduce car emissions of the sort associated with respiratory illnesses and heart problems. It also has the potential reduce emissions of the type associated with global warming. The sensor will be of value to OEM automotive companies worldwide. It will have the potential to reduce the sales of competitor products so competitors may wish to try and copy the technology themselves.

WP6: Software development for the ETG sensor.

Anticipated WP Results: Software code needed to make the sensor function + associated new know-how that will form an important part of a PhD research project. The results are expected to be at a level where they can be published in an international peer reviewed paper and/ or presented at a conference.

Case Study/ Discussion

Working as a group discuss your strategy for:

1. Protecting the results
2. Disseminating the results.
3. Exploiting the results.

Identify the main stakeholders for each E&D action if you are to maximise impact from the WP.

What concrete actions will you take?

Key elements of an exploitation and dissemination strategy (H2020)

Might include:

- analyses on the 'state of the art', which will allow applicants to describe the planned developments and differences from existing competing products and services;
- potential users, main competitors and competitive advantages;
- potential geographical coverage and economic size of the target markets where project results will be exploited and disseminated;
- analyses on the intellectual property that is needed and will be brought to the project, including for example information on knowledge and inventions; these analyses could also cover freedom to operate searches;
- facts and figures on the planned exploitable results and their areas of application and intellectual property protection that will allow the evaluation of their potential impact;
- description of the exploitation roadmap and business model
- description and timeline of the planned dissemination activities
- research data management

Dissemination and Data Management

Outline the strategy for knowledge management and protection.

- Include measures to provide open access (free on-line access, such as the 'green' or 'gold' model) to peer-reviewed scientific publications which might result from the project.

Where relevant, include information on how the participants will manage the research data generated and/or collected during the project, in particular:

- What types of data will the project generate/collect?
- What standards will be used?
- How will this data be exploited and/or shared/made accessible for verification and re-use? If data cannot be made available, explain why.
- How will this data be curated and preserved?

Communication activities

Describe the proposed communication measures for promoting the project and its findings during the period of the grant.

Measures should be proportionate to the scale of the project, with clear objectives. They should be tailored to the needs of various audiences, including groups beyond the project's own community.

Where relevant, include measures for public/societal engagement on issues related to the project.

Summary: Innovation Management and Exploitation Plan

Recommendation for developing your PEDR

Provide detail on how intellectual assets will be managed and realised in your project e.g. address issues of

- foreground
- background
- management
- ownership and
- valorisation.

Outline an innovation management plan *suitable for the specific project*.

Link implementation of the plan to an individual or individuals who will have responsibility for coordinating this activity across the partnership and allocate financial resources for activities.

Top Tip: One size does not fit all. Be project specific not 'Euro-speak generic'.



Useful resources

The Plan for the Exploitation and Dissemination of Results in Horizon 2020



European
IPR Helpdesk

www.iprhelpdesk.eu

European IPR Helpdesk

Fact Sheet

*The Plan for the Exploitation and Dissemination of Results
in Horizon 2020*

July 2015

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Introduction

Horizon 2020 is a Research and Innovation programme aiming at fostering competitiveness and growth and increasing benefits to the European Union economy and citizens. Under different funding schemes the framework programme supports research and development activities resulting in new knowledge, new products and services, and also in non-technological and social innovation. It is essential that the public investment in these activities is converted into socio-economic benefits for the society. This idea is reflected in the Horizon 2020 Rules for Participation¹ with a clear accent to the beneficiaries' obligations to exploit and disseminate the outcomes of the funded activities.

¹ See Article 43 of the Horizon 2020 Rules for Participation available at:
http://ec.europa.eu/research/participants/data/ref/h2020/legal_basis/rules_participation/h2020-rules-participation_en.pdf

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