

# FUNDING EXPERT ACADEMY

## **IMS 6: Dealing successfully with Impact including Dissemination & Exploitation in Horizon Europe**

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Horizon Europe Coach

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# “Death by Powerpoint”



- *This set of slides is the core material not only for my training on how to develop winning Horizon Europe grant applications but it serves also the purpose of a **manual** for consulting it and applying its step-by-step practices, tools, examples and tips EVERYTIME you are involved in the development of an Horizon Europe proposal. No matter, if you are a novice or an expert in developing HEU proposals, I strongly recommend you to follow slide per slide its instructions for getting all the help and support you need for success in Horizon EUROPE.*
- *This is the **reason of the large number of slides**, i.e. to have a detailed manual to consult consistently in the Horizon Europe proposal development cycle as a compass AFTER THE TRAINING and **not to experience the death by powerpoint incident!***
- *I normally run all my courses by using the flipchart for writing notes and having hands on practice but this would take us a week for such a course which is great if you can invest that time but if not, then we have to compromise with powerpoint slides.*
- *However, even so, I guarantee to you an exciting journey, so welcome on board!*

Nikolaos FLORATOS

# Introduce yourself

Use the chat to virtually introduce

- Your name
- Your expertise on R&I European Funding programme
- Your **research specialisation/keywords (Research interests in one word each as specific as possible)**
- Your expectations from this webinar.



# Course Structure on

## **IMS 6: Dealing successfully with Impact including Dissemination & Exploitation in Horizon Europe**

**10:00 - 10:15** - Welcome Note by Tubitak/Alexander

**10:15 - 10:30** - Recapitulation on IM5- Discussion on any work/assignments and questions related to IMS5 by participants

**10:30 - 11:30** – Module 1: Master public resources related to Impact in Horizon Europe and exploit them to your advantage

**11:30 - 11:45** - Break

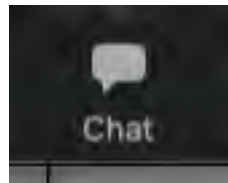
**11:45 - 13:15** – Module 2: Action plans (Tips and best practices) related to the expected impacts in Horizon Europe workprogrammes including hands-on practice (at the end)

**13:15 - 13:30** - Break

**13:30 - 15:00** – Module 3: How to impress evaluators with your Impact section (incl. DEC activities) in the proposal grant application of Horizon Europe: Examples and templates aligned with the norms and expectations from the Impact section in the grant application including hands-on practice

**15:00 - 15:15** - Course evaluation

# Use the chat facility



to ask any question  
during the webinar.

# Recapitulation

Discussion on any work/assignments  
and questions related to IMS5 by  
participants

# Hands on Practice from IMS5

1. Apply the three different techniques and create a list of **the names and contact details** of successful coordinators in your research area based on the [template](#) provided
2. Identify your strong points based on the [self-assessment form](#) and use them in order to
3. Write an **email** to each one of the identified contacts for engaging and connecting with them either to support your idea or to get involved in any initiatives

Alternatively, create an idea for a specific call topic that is I.D.E.A. (I.ntelligent, D.urable, E.laborated, A.ttractive)

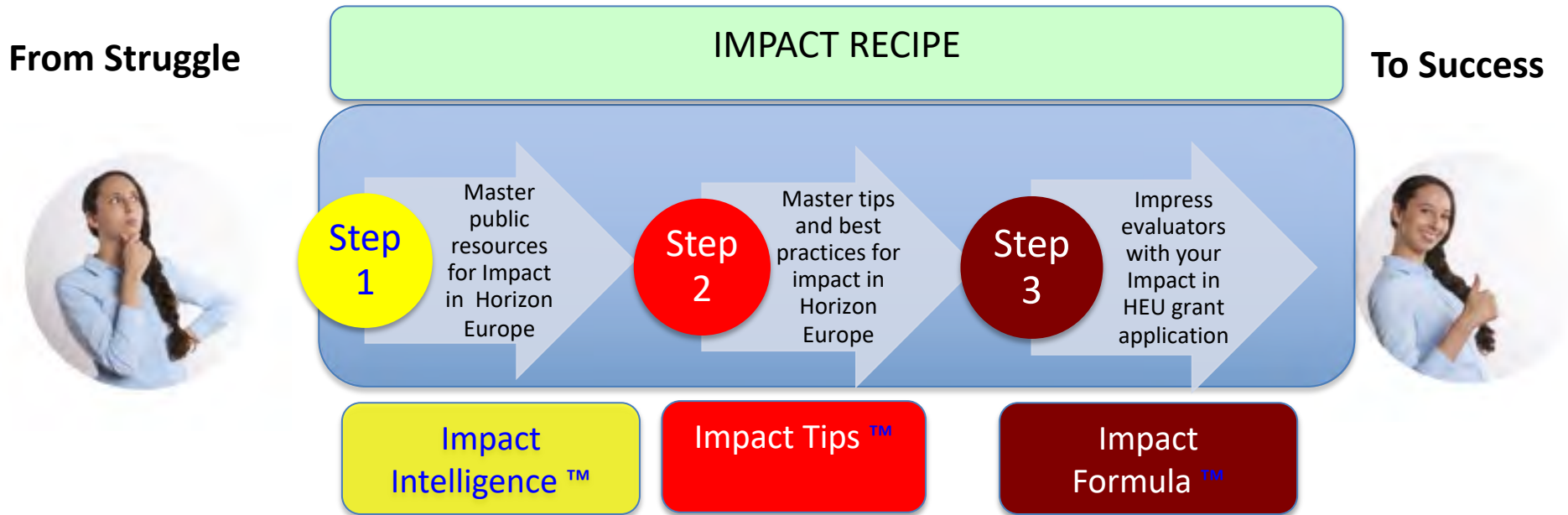




# How experts will deal successfully with Impact in Horizon Europe

## **Horizon Europe Impact Formula**

# HEU Recipe for successful Impact



# Module 1

Impact Intelligence in Horizon Europe:  
Master public resources related to Impact  
in Horizon Europe and exploit them to your  
advantage

# Horizon Europe Impact Intelligence

## Impact Intelligence from

- Horizon Europe Key purpose
- Horizon Europe Key documents
- Horizon Europe Structure
- Horizon Europe Workprogrammes
- Horizon Europe type of Actions
- Horizon Europe other Concepts (B-U, T-D, TRLs, Impact)
- Other impacts beyond the expected ones



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# Intelligence behind Horizon Europe key purposes

Part of step 1: Impact Intelligence

# Impact in Horizon Europe should support its purpose

Why Horizon Europe Funding (its purpose) – Three  
Priorities/General Impacts

- **Scientific Impact:** To strengthen the EU's scientific and technological bases and the European Research Area (ERA), i.e. *to Create forefront (new and useful) knowledge in Europe*
- **Societal Impact:** To deliver on citizens priorities and sustain our socioeconomic model and values, i.e. to improve Quality of life of Citizens
- **Economic/Technological Impact:** To boost Europe's innovation capacity, competitiveness and jobs, *i.e. to advance Growth*

# Horizon Europe Structure

## Pillar I Excellent Science

European Research Council

Marie Skłodowska-Curie  
Actions

Research Infrastructures

## Pillar II Global Challenges and European Industrial Competitiveness

- Clusters
- Health
  - Culture, Creativity and Inclusive Society
  - Civil Security for Society
  - Digital, Industry and Space
  - Climate, Energy and Mobility
  - Food, Bioeconomy, Natural Resources, Agriculture and Environment

Joint Research Centre

## Pillar III Innovative Europe

European Innovation Council

European innovation  
ecosystems

European Institute of  
Innovation  
and Technology

## Widening Participation and Strengthening the European Research Area

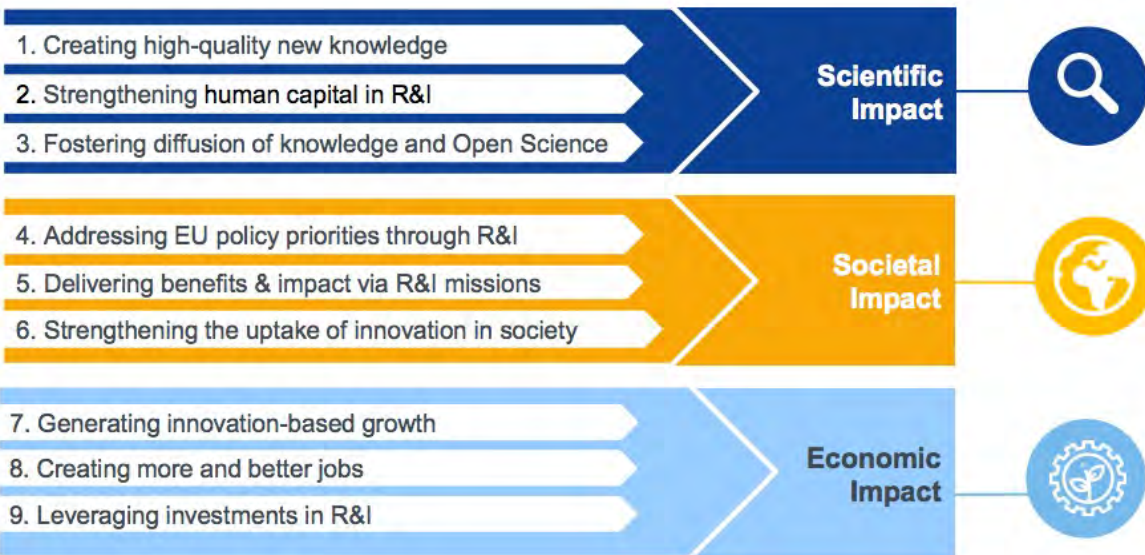
Widening participation and spreading excellence

Reforming and Enhancing the European R&I system

Source: EC

Source: EC

# Key Impacts per pillar/area




**Scientific**, e.g. contributing to specific scientific advances, across and within disciplines, creating new knowledge, reinforcing scientific equipment and instruments, computing systems (i.e. research infrastructures);

- **Economic/technological**, e.g. bringing new products, services, business processes to the market, increasing efficiency, decreasing costs, increasing profits, contributing to standards' setting, etc.

- **Societal**, e.g. decreasing CO2 emissions, decreasing avoidable mortality, improving policies and decision making, raising consumer awareness.

Source: EC





# Intelligence behind Horizon Europe key documents

Strategic Plan/Orientations

Implementation Strategy

**Part of step 1: Impact Intelligence**

# Horizon Europe Process



## Orientations

- 142 pages
- More details on SDGs per cluster
- Key Policy documents applicable per Cluster
- **Expected Impacts** similar as in Strategic Plan but with **more details**

## Strategic Plan:

- 101 pages
- Official document with specific targets
- Early involvement and extensive exchanges with MS
- Consultations with stakeholders and public based on orientations towards the strategic plan

## Workprogramme:

- Final Versions available
- Official document that describes the
  - **Calls for proposals**
  - expectations from the projects to be funded
  - Budget per call and per action
  - Type of actions
  - Eligibility.

# Intelligence from Orientations in Horizon Europe

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Excellent Source for

- targeted Policies, Goals and Impacts
- Important referenced documentation

☺ Important building blocks for winning Horizon Europe grant applications

# Strategic Plan vs Workprogramme

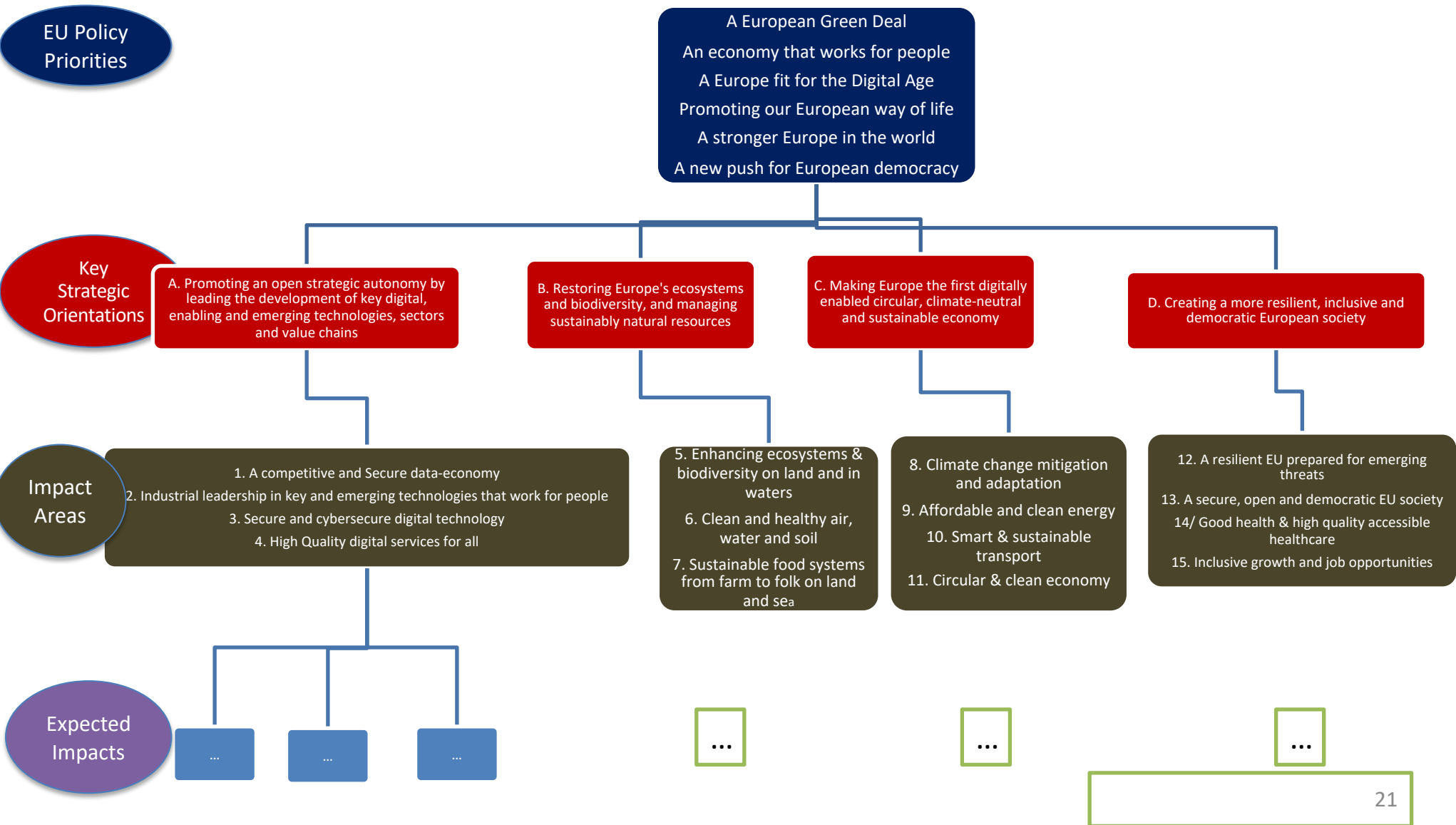
## HEU Strategic Plan

- For **four** years (2021-2024)
- Focus on key strategic orientations (KSO), impact areas and **expected impacts**

## HEU Workprogramme

- For **two** years (2021-2022)
- Very specific and detailed
- Focus on specific **expected outcomes**

# Check mindmap on expected impacts based on strategic plan 2021-2024





# in Horizon Europe

Project Duration

By end of project

Within 5 years after project end



- Resources dedicated to or consumed by the project
- Usually a NOUN staff, facilities, money, time...

- What the project does with inputs to fulfill its mission
- Usually a GERUND a verb in its "-ing" form, such as assessing, enabling, reviewing...

- The volume of work accomplished by the project
- Usually a QUANTITY the number of projects, the number of case studies...

- Benefits or changes for participants during or after project activities
- Usually a CHANGE better projects, increased skills...

- The long term consequences of the intervention
- A fundamental CHANGE intended or unintended in a system or society

Your Planned Work

Your Intended Results

Source: Nixor/Kellog Logic Model

# Article 26 and Data Sheet from MGA

## ARTICLE 26 — IMPACT EVALUATIONS

### 26.1 Impact evaluation

The granting authority may carry out impact evaluations of the action, measured against the objectives and indicators of the EU programme funding the grant.

Such evaluations may be started during implementation of the action and until the time-limit set out in the Data Sheet (see Point 6). They will be formally notified to the coordinator or beneficiaries and will be considered to start on the date of the notification.

If needed, the granting authority may be assisted by independent outside experts.

The coordinator or beneficiaries must provide any information relevant to evaluate the impact of the action, including information in electronic format.

#### **Standard time-limits after project end:**

Confidentiality (for X years after final payment): 5

Record-keeping (for X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

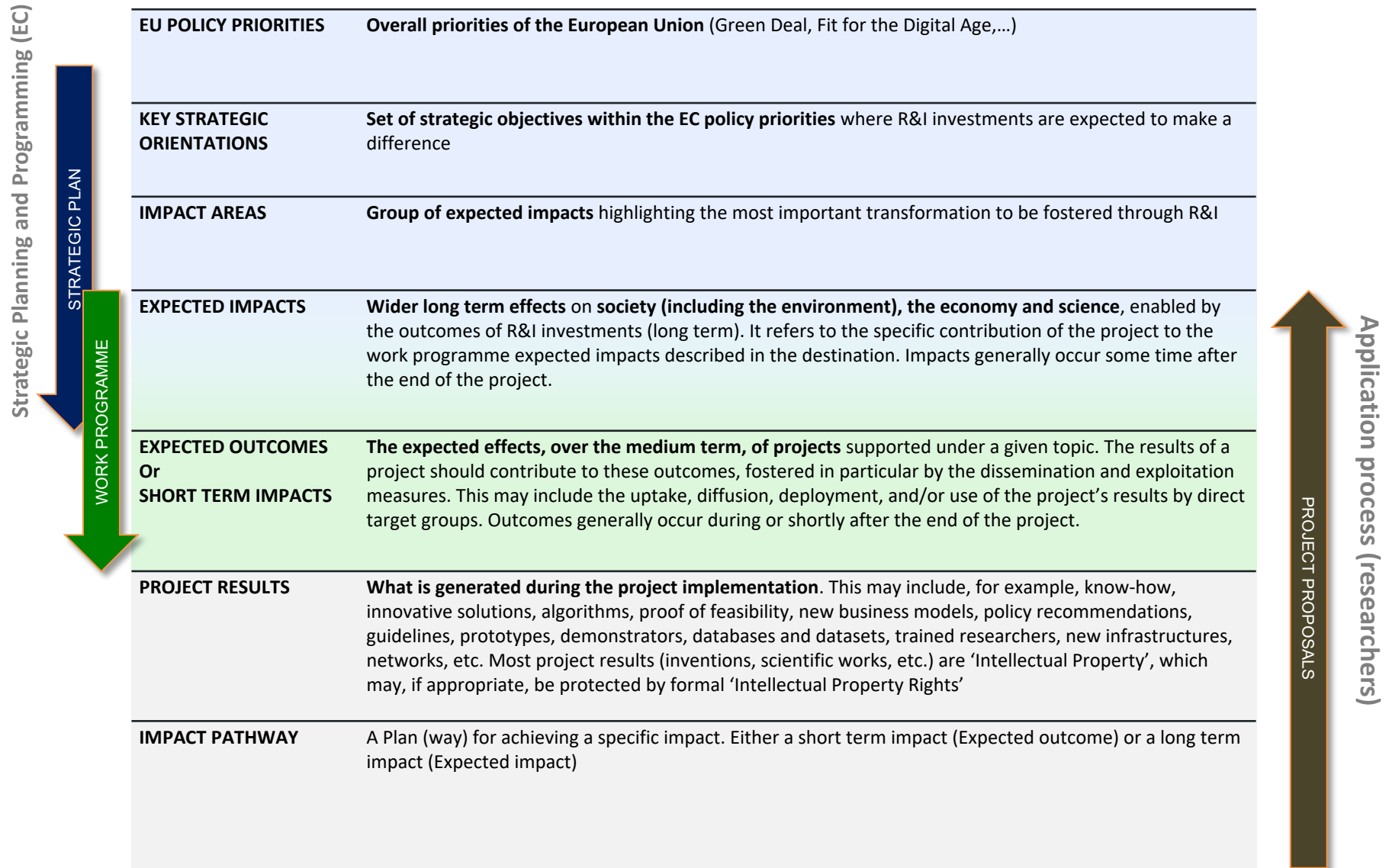
Reviews (up to X years after final payment): 2

Audits (up to X years after final payment): 2

Extension of audit findings from other grants to this grant (no later than X years after final payment): 2

Impact evaluation (up to X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

# Understanding the different terms in the orientations, strategic plan & workprogramme




Inspired by EC as first Source



# Intelligence from Implementation Principles in Horizon Europe

Baseline info: [Implementation Strategy for Horizon Europe](#)

- **Maximising impacts** : clearer specification of the expected impact at the level of a call, new indicators , reporting beyond the life of the project related to impact
- **Ensuring greater transparency and further simplification**: clear WP text , shorter proposals (e.g. ~9 pages for Impact section in RIA/IA)

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# Intelligence behind Horizon Europe Structure

Part of step 1: Impact Intelligence

# Intelligence behind Horizon Europe Structure

Pillars

# What is **Bottom-Up** or **Top-Down** call topic?



- Call topics that are open to proposer-driven ideas, solutions and impacts are called **bottom-up** call topics,
- Call topics that expected solutions, specific outcomes or impacts are prescribed by the EC/WP are called **top-down** call topics

# Horizon Europe Structure and Impact

B-U Calls & Proposer-driven Impacts

**Pillar I**  
Excellent Science

European Research Council

Marie Skłodowska-Curie  
Actions

Research Infrastructures

T-D Calls & EC prescribed Impacts

**Pillar II**  
Global Challenges and  
European Industrial  
Competitiveness

Clusters

- Health
- Culture, Creativity and Inclusive Society
- Civil Security for Society
- Digital, Industry and Space
- Climate, Energy and Mobility
- Food, Bioeconomy, Natural Resources, Agriculture and Environment

Joint Research Centre

B-U Calls & Proposer-driven Impacts

**Pillar III**  
Innovative Europe

European Innovation Council

European innovation  
ecosystems

European Institute of  
Innovation  
and Technology

**Widening Participation and Strengthening the European Research Area**

Widening participation and spreading excellence

B-U Calls & Proposer-driven Impacts

Reforming and Enhancing the European R&I system

T-D Calls & EC prescribed Impacts

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# Intelligence behind Horizon Europe Workprogrammes

Impact on T-D calls

**Part of step 1: Impact Intelligence**

# Intelligence behind Horizon Europe Workprogrammes

Impact in T-D calls

# Workprogramme Cluster 1 Health

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#### Call - Staying Healthy

Conditions for the C  
HORIZON-HLTH-2  
understanding of met  
HORIZON-HLTH-2  
empowerment and he  
HORIZON-HLTH-2  
HORIZON-HLTH-2  
Points (NCPs) for the

#### Call - Staying healthy

Conditions for the C  
HORIZON-HLTH-2  
in times of change ...  
HORIZON-HLTH-2  
(AI) tools to predict t  
progression .....  
HORIZON-HLTH-2  
the life course .....

#### Call - Staying healthy

Conditions for the C  
HORIZON-HLTH-2  
inflammation in heal

### Destination 2. Livin

#### Call - Environment an

Conditions for the C  
HORIZON-HLTH-2  
health .....  
HORIZON-HLTH-2  
HORIZON-HLTH-2  
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#### Call - Partnerships in

Conditions for the C

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#### Call - Environmen

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#### Destination 3. T

#### Call - Tackling dis

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HORIZON-HLT  
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#### Call - Tackling dis

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#### Call - Tackling dis

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HORIZON-HLT  
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HORIZON-HLT  
Research Collab

#### Call - Partnership

Conditions for the Call .....  
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Research Area (ERA) for h

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#### Call - Ensuring access to im

Conditions for the Call .....  
HORIZON-HLTH-2021-C  
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HORIZON-HLTH-2021-C

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Conditions for the Call .....  
HORIZON-HLTH-2021-T  
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# CLUSTER 2 ‘Culture, Creativity and Inclusive Society’

Horizon Europe - Work Programme 2021-2022  
Culture, creativity and inclusive society

Horizon Eu  
Culture

Horizon Europe - Work Programme 2021-2022  
Culture, creativity and inclusive society

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- HORIZON-CL2-2021-DEMOCRACY-01-02: Economic and social impacts of changing supply chains and declining trade integration
- HORIZON-CL2-2021-DEMOCRACY-01-03: Feminisms
- HORIZON-CL2-2021-DEMOCRACY-01-04: Democratic neighbourhood
- HORIZON-CL2-2021-DEMOCRACY-01-05: Politics and world

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- Conditions for the Call
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- HORIZON-CL2-2022-DEMOCRACY-01-02: The future of participation
- HORIZON-CL2-2022-DEMOCRACY-01-03: The impact of digital technologies
- HORIZON-CL2-2022-DEMOCRACY-01-04: Education for digital citizenship
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- Conditions for the Call

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- HORIZON-CL2-2021-TRANSFORMATIONS-01-02: Providing support in a changing world of work and social protection
- HORIZON-CL2-2021-TRANSFORMATIONS-01-03: Determining key drivers of inequality trends
- HORIZON-CL2-2021-TRANSFORMATIONS-01-04: Addressing poor learning outcomes in basic skills and early school leaving at national, regional and local level in Europe
- HORIZON-CL2-2021-TRANSFORMATIONS-01-05: Integration of emerging new technologies into education and training
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- HORIZON-CL2-2021-TRANSFORMATIONS-01-07: Digital skills for the future of work
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Horizon Europe - Work Programme 2021-2022  
Culture, creativity and inclusive society

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2. Expertise for the design, implementation and evaluation of Cluster 2, Culture, Creativity and Inclusive Society
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# CLUSTER 3 Security

Horizon Europe - Work Programme 2021-2022  
Civil Security for Society

Horizon Europe - Work Programme 2021-2022  
Civil Security for Society

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# Cluster 5 - Climate, Energy and Mobility

Horizon Europe - Work Programme 2021-2022

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Horizon Europe - Work Programme 2021-2022  
Climate, Energy and Mobility

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Climate, Energy and Mobility

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Horizon Europe - Work Programme 2021-2022  
Health

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- **Expected Outcomes of each Call Topic**
- **Scope of each Call Topic**

# WP Introduction

Important documents to consider for **policies** and **statistics**

- [Recovery Plan for Europe](#)
- [NextGenerationEU \(NGEU\)](#)
- [European Electronic Health Records](#)
- [European Health Data Space](#)
- [European Health Union](#)
- [EU-Health Emergency Preparedness and Response Authority EU-HERA](#)
- [Europe's Beating Cancer Plan](#)
- [EIT-KIC Health](#)
- [EIT-KIC Digital](#)
- [European Open Science Cloud](#)

**General Expected Impacts**

The work programme 2021-2022 of cluster 1 'Health' is directed towards two Key Strategic Orientations (KSOs) for research and innovation set by Horizon Europe's strategic plan 2021-2024, notably to creating a more resilient, inclusive and democratic European society (KSO-D) and promoting an open strategic autonomy by leading the development of key digital, enabling and emerging technologies, sectors and value chains (KSO-A). It aims to mainly contribute to four impact areas of the strategic plan: Good health and high-quality accessible health care; A resilient EU prepared for emerging threats; High quality digital services for all; and A competitive and secure data-economy. More specifically, cluster 1 aims to contribute to six expected impacts as set out by the strategic plan, which are the following six destinations of this work programme:

**Destination 1 - Staying healthy in a rapidly changing society:** Citizens of all ages stay healthy and independent in a rapidly changing society thanks to healthier lifestyles and behaviours, healthier diets, healthier environments, improved evidence-based health policies, and more effective solutions for health promotion and disease prevention.

**Destination 2 - Living and working in a health-promoting environment:** Living and working environments are health-promoting and sustainable thanks to better understanding of environmental, occupational, social and economic determinants of health.

**Destination 3 - Tackling diseases and reducing disease burden:** Health care providers are able to better tackle and manage diseases (infectious diseases, including poverty-related and neglected diseases, non-communicable and rare diseases) and reduce the disease burden on patients effectively thanks to better understanding and treatment of diseases, more effective and innovative health technologies, better ability and preparedness to manage epidemic outbreaks and improved patient safety.

**Destination 4 - Ensuring access to innovative, sustainable and high-quality health care:** Health care systems provide equal access to innovative, sustainable and high-quality health care thanks to the development and uptake of safe, cost-effective and people-centred solutions, with a focus on population health, health systems resilience, as well as improved evidence-based health policies.

**Destination 5 - Unlocking the full potential of new tools, technologies and digital solutions for a healthy society:** Health technologies, new tools and digital solutions are applied effectively thanks to their inclusive, secure and ethical development, delivery, integration and deployment in health policies and health care systems.

**Destination 6 - Maintaining an innovative, sustainable and globally competitive health-related industry:** EU health industry is innovative, sustainable and globally competitive thanks to improved up-take of breakthrough technologies and innovations, which makes the EU with its Member States more resilient and less dependent from imports with regard to the access to and supply of critical health technologies.

<https://www.copernicus.eu/en/copernicus-services>; Galileo, the European Global Satellite Navigation System (GNSS) <https://www.gsc-europa.eu/galileo/services/galileo-initial-services>; and the European Geostationary Navigation Overlay Service (EGNOS) <https://www.gsa.europa.eu/egnoss/services>.

## Intro

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# Cluster Destination Structure 1/2

Horizon Europe - Work Programme 2021-2022  
Health

## Destination 1 – Staying healthy in a rapidly changing society

Calls for proposals under this destination are directed towards the Key Strategic Orientation KSO-D 'Creating a more resilient, inclusive and democratic European society' of Horizon Europe's Strategic Plan 2021-2024. Research and innovation supported under this destination should contribute to the impact area 'Good health and high quality, accessible health care'

and in particular to the following expected impact, set out in the Strategic Plan for the health cluster: 'citizens of all ages stay healthy and independent in a rapidly changing society thanks to healthier lifestyles and behaviours, healthier diets, healthier environments, improved evidence-based health policies, and more effective solutions for health promotion and disease prevention'. In addition, research and innovation supported under this destination should also

contribute to the following impact areas: 'High quality digital services for all', 'Sustainable food systems from farm to fork on land and sea', and 'Climate change mitigation and adaptation'.

People's health care needs are different, depending on their age, stage of life and socio-economic background. Their physical and mental health and well-being can be influenced by their individual situation as well as the broader societal context they are living in. Furthermore, health education and behaviour are important factors. Currently, more than 790 000 deaths per year in Europe are due to risk factors such as smoking, drinking, physical inactivity, and obesity. Upbringing, income, education levels, social and gender aspects also have an impact on health risks and how disease can be prevented. Moreover, people's health can be impacted by a rapidly changing society, making it challenging to keep pace and find its way through new technological tools and societal changes, which both are increasing demands on the individual's resilience. In order to leave no one behind, to reduce health inequalities and to support healthy and active lives for all, it is crucial to provide suitable and tailor-made solutions, including for people with specific needs.

In this work programme, destination 1 will focus on major societal challenges that are part of the European Commission's political priorities, notably diet and health (obesity), ageing and demographic change, mental health, digital empowerment in health literacy, and personalised prevention. Research and innovation supported under this destination will provide new evidences, methodologies and tools for understanding the transition from health to disease. This will allow designing better strategies and personalised tools for preventing diseases and promoting health, including through social innovation approaches. Specific measures will also be developed to educate and empower citizens of all ages and throughout their life, to play an active role in the self-management of their own health and self-care, to the benefit of an active and healthy ageing. In 2022, it will also call for proposals for improving the availability and use of artificial intelligence (AI) tools to predict the risk for onset and progression of chronic diseases. Key to achieving the expected impacts is the availability and accessibility of health data from multiple sources, including real-world health data, which will require appropriate support by research and data infrastructures, AI-based solutions, and robust and transparent methodologies for analysis and reporting.

General Expected Impact

Primary Expected Impact

Secondary Expected Impacts (Contributions)

Brief Societal/impact Context

Essential resources for achieving expected impacts



# Cluster Destination Structure 2/2

Horizon Europe - Work Programme 2021-2022  
Health

Dialogue and coordination between stakeholders and policy makers as well as integration across different settings will be needed to develop more effective cross-sectoral solutions for health promotion and disease prevention and deliver improved evidence-based health for all.

Essential value-chain players for expected impacts

In view of increasing the impact of EU investments under Horizon Europe, the European Commission welcomes and supports cooperation between EU-funded projects to enable cross-fertilisation and other synergies. This could range from networking to joint activities such as the participation in joint workshops, the exchange of knowledge, the development and adoption of best practices, or joint communication activities. Opportunities for potential synergies exist between projects funded under the same topic but also between other projects funded under another topic, cluster or pillar of Horizon Europe (but also with ongoing projects funded under Horizon 2020). In particular, this could involve projects related to European health research infrastructures (under pillar I of Horizon Europe), the EIC strategic challenges on health and EIT-KIC Health (under pillar III of Horizon Europe), or in areas cutting across the health and other clusters (under pillar II of Horizon Europe). For instance, with cluster 2 "Culture, Creativity and Inclusive Society" such as on health inequalities, on other inequalities affecting health, or on citizens' behaviour and engagement; with cluster 4 "Digital, Industry and Space" such as on digital tools, telemedicine or smart homes; with cluster 5 "Climate, Energy and Mobility" such as on urban health or on mitigating the impact of road traffic accidents and related injuries; with cluster 6 "Food, Bioeconomy, Natural Resources, Agriculture and Environment" such as on the role of nutrition for health (incl. human microbiome, mal- and over-nutrition, safe food), personalised diets (incl. food habits in general and childhood obesity in particular) and the impact of food-related environmental stressors on human health (incl. marketing and consumer habits).<sup>8</sup>

Essential synergies for expected impacts with other projects, clusters and (Sub-)programmes

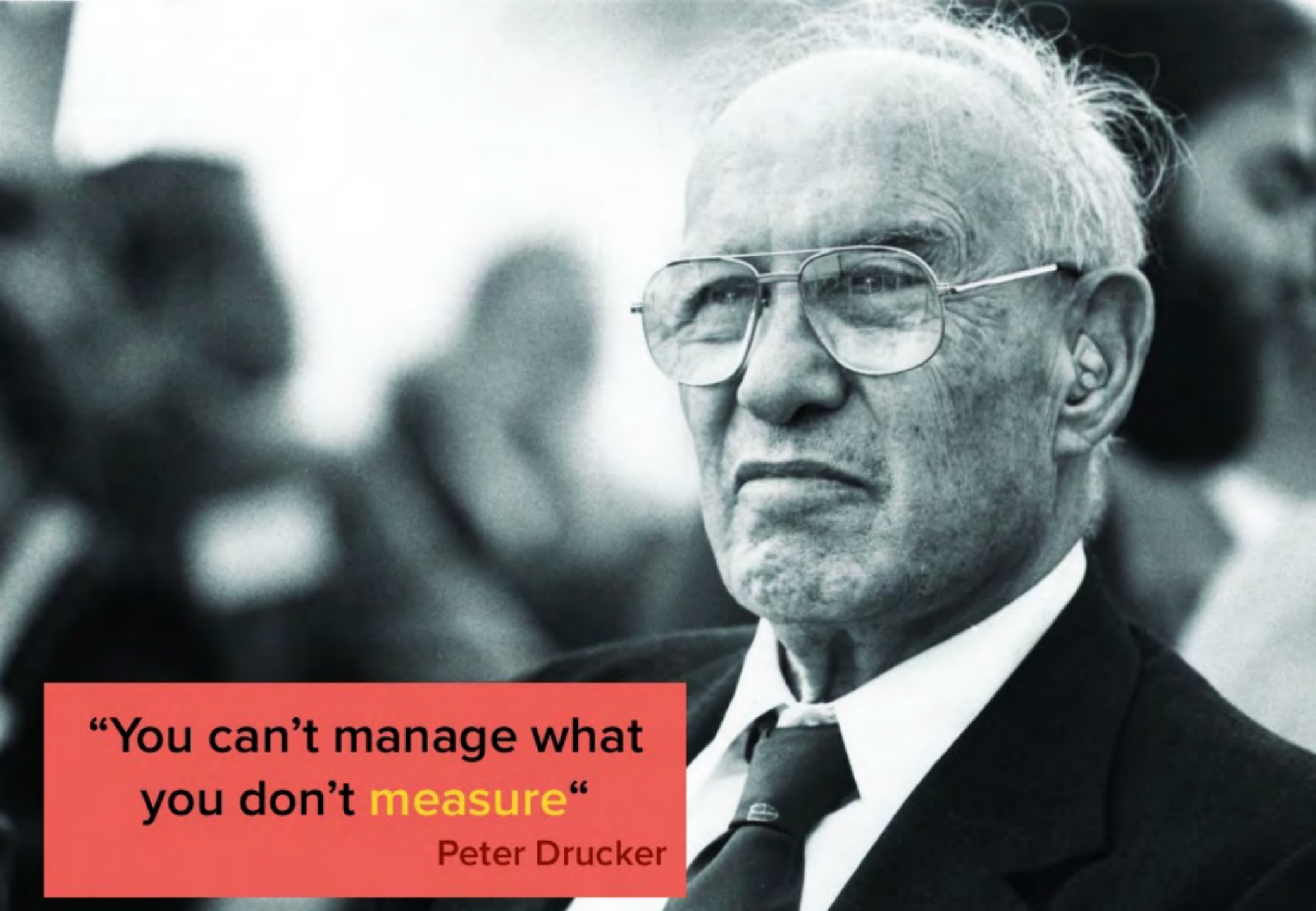
## Expected impacts:

Proposals for topics under this destination should set out a credible pathway to contributing to staying healthy in a rapidly changing society, and more specifically to one or several of the following impacts:

- Citizens adopt healthier lifestyles and behaviours, make healthier choices and maintain longer a healthy, independent and active life with a reduced disease burden, including at old ages or in other vulnerable stages of life.
- Citizens are able and empowered to manage better their own physical and mental health and well-being, monitor their health, and interact with their doctors and health care providers.
- Citizens' trust in knowledge-based health interventions and in guidance from health authorities is strengthened, including through improved health literacy (including at young ages), resulting in increased engagement in and adherence to effective strategies for health promotion, diseases prevention and treatment, including increased vaccination rates and patient safety.

Expected Impacts:  
Expected project contributions up to 5 years after the end of the project

<sup>8</sup> Strategic Plan 2021-2024 of Horizon Europe, Annex I, Table 2.



“You can’t manage what  
you don’t **measure**”

Peter Drucker

# Key challenges/Problems should be identified and quantified in the proposal for assessing by the project end their achievement level

**Expected Outcome:** This topic aims at supporting activities that are enabling or contributing to one or several impacts of destination 1 “*Staying healthy in a rapidly changing society*”. To that end, proposals under this topic should aim for delivering results that are directed, tailored towards and contributing to some of the following expected outcomes:

• Researchers, developers of medical interventions, and health care professionals have much better understanding of basic biological pathways (genetic and epigenetic blueprints) conferring susceptibility to and protecting against overweight/obesity, i.e. how genetic, epigenetic, environmental, socio-economic and lifestyle factors interact to drive or prevent the transition from normal weight to overweight/obesity throughout the life course.

• Health care professionals, national/regional/local public authorities and other relevant actors (e.g. schools, canteens, hospitals, work places, shopping malls, sport centres):

○ Have access to, adopt and implement evidence-based clinical guidelines, best practices, coordinated, pan-European, multidisciplinary preventive strategies, policy recommendations and/or new policies to fight overweight/obesity and their co-morbidities throughout the life course.

○ Have access to and make use of a robust outcomes framework and tool-kit for standardised collection of economic and cost data related to the prevention and treatment of overweight/obesity and its co-morbidities at population level across European regions and countries.

○ Adopt and implement tailor-made prevention campaigns to tackle overweight/obesity, including campaigns for improving integration of health

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Horizon Europe - Work Programme 2021-2022  
Health

education into academic learning and raising awareness of health care providers and citizens.

• Citizens have access to and make use of new tools and services to make informed decisions about lifestyle choices that will prevent them from becoming overweight/obese.

## Expected Outcomes => Key challenges NOW=>quantified data & qualitative analysis at EU and at partners' countries)

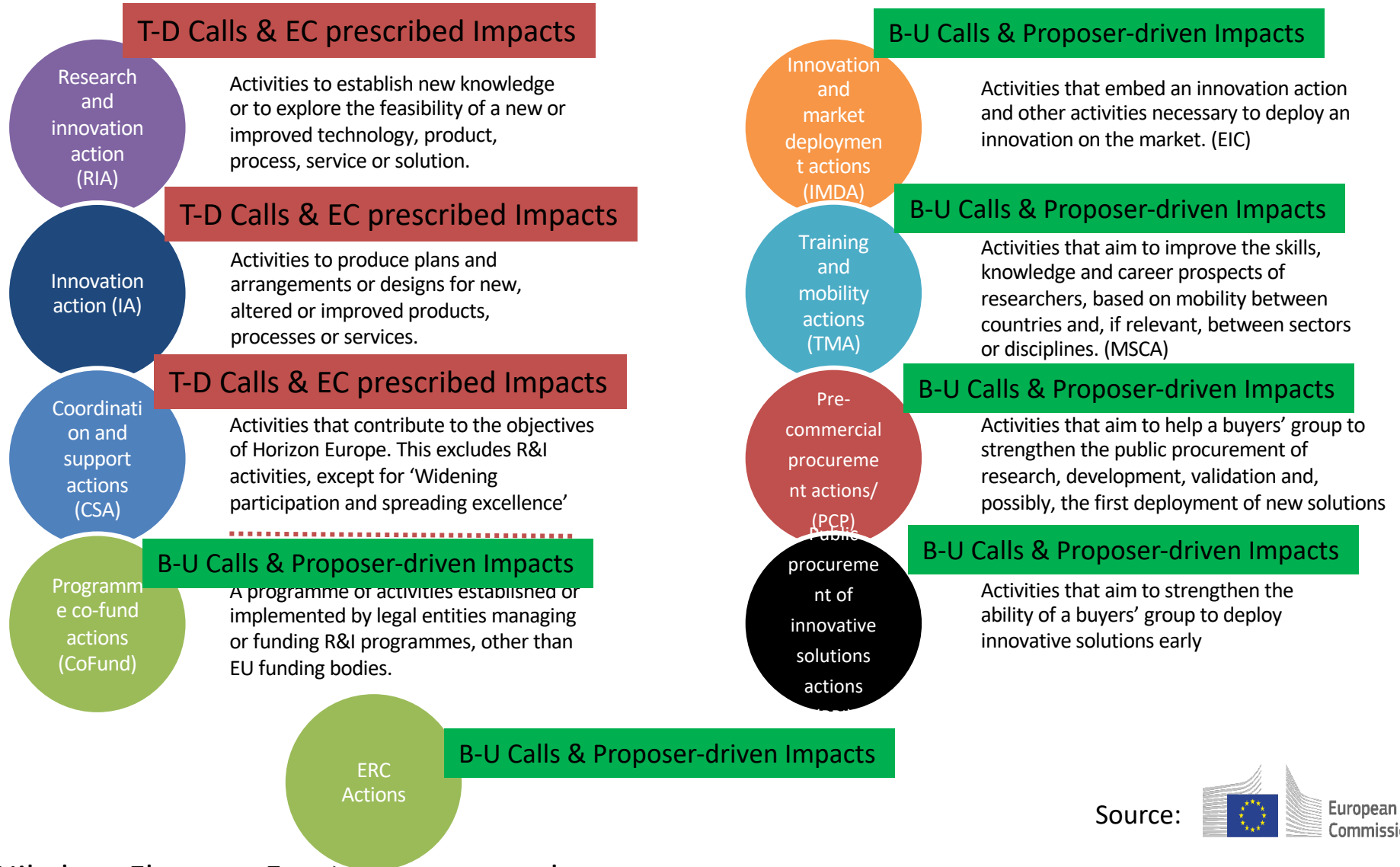
1. Lack of concrete knowledge on the basic biology of obesity and new ways to prevent it (how much we know on the basic biology of obesity?)
2. Any current evidence-based clinical guidelines, best practices, pan-European, multidisciplinary preventive strategies, policy recommendations to fight obesity and its co-morbidities in life?
3. If so, how effective they have been (each one)?
4. Any processes, initiatives, tools/tool-kit for standardized collection of economic and cost data related to the prevention and treatment of obesity/its co—morbidities?
5. If so, how effective they have been?
6. Any tailor-made prevention campaigns to tackle obesity
7. Any campaigns for integrating health education into academic learning
8. How effective these campaigns have been (each one)?
9. Any tools and services for empowering citizens to make responsible decisions about their lifestyle choices for not becoming obese?
10. If so, how effective they have been (each one)?

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# Intelligence based on type of actions and expected impact

**Part of step 1: Impact Intelligence**

## Type of actions and expected impact



Source:





# Intelligence on Readiness level and Impact

Societal Readiness Level

**Part of step 1: Impact Intelligence**

# Societal Readiness Levels

You may wish to consider **Societal Readiness Levels also**, i.e. how mature is a solution/finding so that to be integrated into society and achieve the expected impact, more at

[https://innovationsfonden.dk/sites/default/files/2019-03/societal\\_readiness\\_levels\\_-\\_srl.pdf](https://innovationsfonden.dk/sites/default/files/2019-03/societal_readiness_levels_-_srl.pdf)



1. **SRL 1** – identifying problem and identifying societal readiness
2. **SRL 2** – formulation of problem, proposed solution(s) and **potential impact**, expected societal readiness by the end of the project; identifying relevant stakeholders for the project.
3. **SRL 3** – initial testing of proposed solution(s) together with relevant stakeholders
4. **SRL 4** – problem validated through pilot testing in relevant environment to **substantiate proposed impact and societal readiness**
5. **SRL 5** – proposed solution(s) validated, now by relevant stakeholders in the area
6. **SRL 6** – solution(s) demonstrated in relevant environment and in co-operation with relevant stakeholders to **gain initial feedback on potential impact**
7. **SRL 7** – refinement of project and/or solution and, if needed, retesting in relevant environment with relevant stakeholders
8. **SRL 8** – proposed solution(s) as well as **a plan for societal adaptation** complete and qualified
9. **SRL 9** – actual project solution(s) proven in relevant environment with **expected impacts achieved**



# Intelligence on SDGs and Impact

Horizon Europe impacts beyond  
expected ones

**Part of step 1: Impact Intelligence**

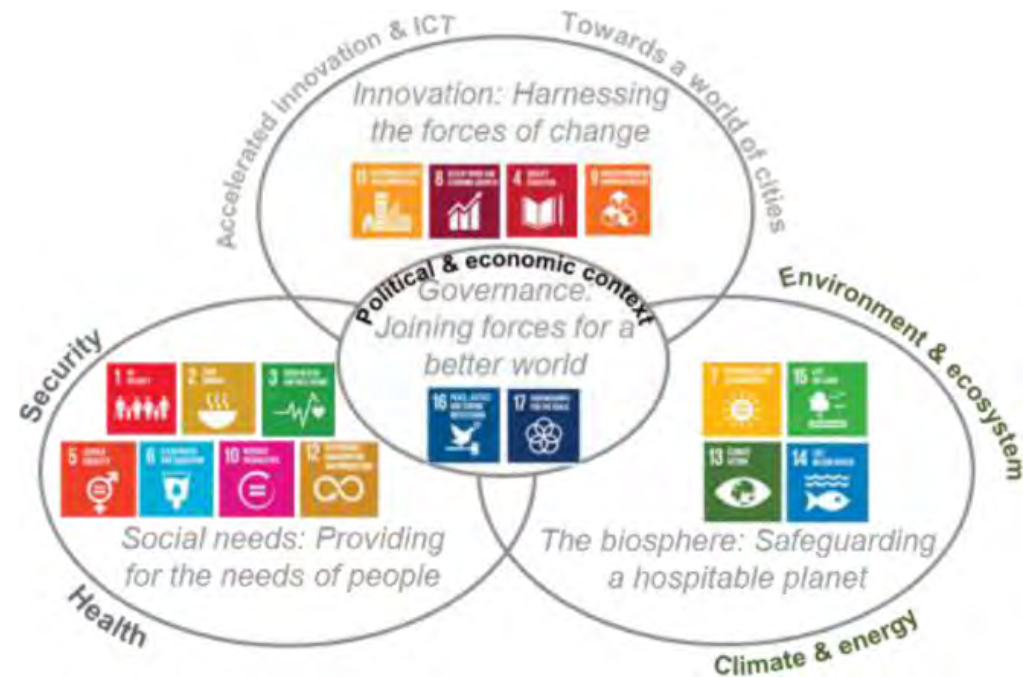


# Horizon Europe Impacts beyond Expected ones

17 Sustainable Development Goals

# Horizon Europe Impacts beyond Expected ones

## 17 Sustainable Development Goals



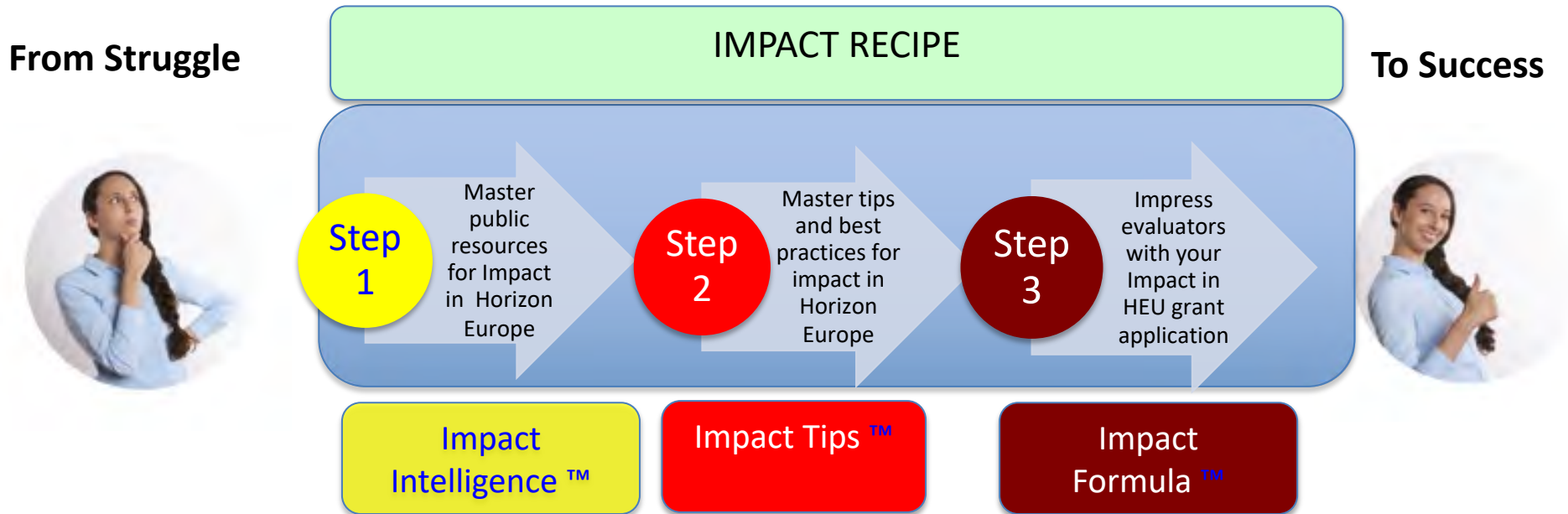
<https://sdgs.un.org/>

# Intelligence behind 17 SDGs

- 17 Sustainable Development Goals
- 169 Subgoals (Targets)
- 247 Metrics (Indicators)
- Each SD goal has a few subgoals/targets and each subgoal one or or metrics/indicators
- Each Horizon Europe project should check first whether it impacts positively or negatively each of the 17 SDGs
- Each of the pillar 2 clusters is linked with specific SDGs referenced in the workprogramme
- Then for ones that could be affected **positively**, check their subgoals and related indicators and explain the way your project **contributes** to those indicators and targets
- Finally, for ones that could be affected **negatively**, consider this as possible **barrier** in your **impact** strategy and suggest counter-measures



# HEU Recipe for successful Impact



# Strategies, tips and best practices for Impact in Horizon Europe

## Module 2



# Impact linked with key actors in key areas

Tip 1

**Part of step 2: Impact Tips**

# Impact in Horizon Europe (especially in T-D) is linked with the level of involvement of key actors in key areas

## Key Actors

- **Policy Makers & Advisors:** to advance policies based on the project recommendations
- **End-users:** to advance the acceptance of the proposed solution by society
- **Industry players:** to advance the proposed solution into the market

## Key areas based on Horizon 2020 topics, e.g.:

- Gender -> SwafS
- Health -> SC1
- Food -> SC2
- Energy -> SC3
- Transport -> SC4
- Climate -> SC5
- Inclusive society -> SC6
- Security -> SC7

# Use case: You need to identify a serious policy maker in gender (e.g. Ministry) as direct partner in your proposal

1. Use [Horizon dashboard](#)
2. Select [H2020 Funded Projects]
3. Switch from {Summary} to [H2020 participations]
4. Select as [Legal Entity Type] *PUB – Public Body (excl. research and edu*
5. *Look for SwafS in topic code under smart search*
- 6.

The screenshot shows the search results for 'swafs-2018-1' in the Horizon dashboard. The search bar at the top contains 'swafs-2018-1'. Below the search bar, there are several tabs for different project categories: 'Swafs-2018-1', 'Swafs-2017-1', 'SWAFS-CROSST', 'Swafs-2016-1', 'Swafs-14-2018-2019-2020', 'Swafs-2019-1', and 'Swafs-02-2016'. The 'SWAFS-CROSST' tab is selected. Below the tabs, there is a section titled 'Add to your selections' with a list of thematic priorities and call IDs. The 'Thematic Priority Abbr' is 'SWAFS-CROSST'. The 'Thematic Priority Combined' is 'SWAFS-CROSST - Science with and for Society - Cross-theme'. The 'Call ID' is 'H2020-IBA-SWAFS-NCP-2018, H2020-Swafs-2017-1, H2020-Swafs-2018-1, H2020-Swafs-2016-1, H2020-Swafs-2019-1'. The 'Topic Code' is 'IBA-SWAFS-NCP-2018, Swafs-23-2017, Swafs-11-2017, Swafs-03-2016-2017, Swafs-10-2017, 22 more'.

The screenshot shows the navigation bar of the Horizon dashboard. It includes a search icon, a dropdown menu for 'H2020 Participations', and navigation arrows. Below the navigation bar, there are two tabs: 'Selections' and 'Insights'.

The screenshot shows the 'Legal Entity Type' dropdown menu. The menu is open, showing a list of options. The 'PUB - Public body (excl. research and ...' option is selected and highlighted in green. Other options include 'HES - Higher or secondary education', 'OTH - Others', 'PRC - Private for profit (excl. education)', and 'REC - Research organisations'. The dropdown menu also includes a search bar and a 'Search in listbox' button.



## Example 1: Identify and connect with a specific person from a policy maker in gender from previously funded projects

You wish to involve a policy maker in your project that deals with gender issues (e.g. for a SWAFS) proposal,

1. You know based on H2020 dashboard that Ministerio de Economía, industria y competitividad is involved in at least a couple of H2020 projects for Gender equality, e.g.

- GENDER equality in the ERA Community To Innovate policy implementation, GENDERACTION
- Supporting the Promotion of Equality in Research and Academia SUPERA

2. Find their websites via CORDIS and look for **deliverables, agendas, minutes** that mention names of persons from this organisation as participants, speakers, authors, contributors, etc

3. Use google to find an email address for the identified person based on the general domain of the organisation (i.e. @organisationdomainname, e.g. @mineco.es)

# Example 2: Identify and connect with a specific person from a policy maker in health from previously funded projects

You wish to identify and connect with an individual from a specific organisation (e.g. Ministry of Health in Italy that is partner in HBM4EU project, [www.hbm4eu.eu/](http://www.hbm4eu.eu/) )

1. Apply some intelligence based on the public deliverables and look for individual names
  1. E.g. check in the deliverables for names of authors or contributors from the organisation you are interested
  2. material from project meetings, such as agendas or minutes
  3. Governance documents such as project management plans, steering committee documents, etc
2. E.g. in HBM4EU, we go to results and download the Governance body, the names of contributors, authors, the content and we identify the name: e.g. head of office of International projects.
3. Use google to find an email address for the identified person based on the general domain of the organisation (i.e. @organisationdomainname, e.g. @sanita.it) e.g. [research.eu.dgric@sanita.it](mailto:research.eu.dgric@sanita.it) or Phone. 0659942596. Fax. E-mail [g.scalera@sanita.it](mailto:g.scalera@sanita.it)

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# Tangible results

Tip 2

# Tangible Results (C.O.R.T./S)

<u>Related Challenges</u>	<u>Project objectives</u>	<u>Expected Projects Results</u>	<u>Achieved TRL/SRL</u>

# Bad examples given by EC in the Horizon Europe template!

## Tables for section 3.2

Table 3.2a: List of milestones

Milestone number	Milestone name	Related work package(s)	Due date (in month)	Means of verification

### KEY

#### Due date

*Measured in months from the project start date (month 1)*

#### Means of verification

*Show how you will confirm that the milestone has been attained. Refer to indicators if appropriate. For example: a laboratory prototype that is 'up and running'; software released and validated by a user group; field survey complete and data quality validated.*

# Examples of means of verification

- A laboratory prototype that is “up and running” **with min 80% prediction accuracy**
- Software released and validated **by min 100 end-users**
- Field survey complete **based on 250 interviewees**
- A “**passepartout**” milestone/means of verification that is applicable for all activities is “Acceptance of each of the deliverables in every workpackage by min 2 peer-reviewers”

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# Follow-up actions after the end of the project to reach TRL 9 and/or SRL 9

Tip 3

**Part of step 2: Impact Tips**

# Tip for great proposals!

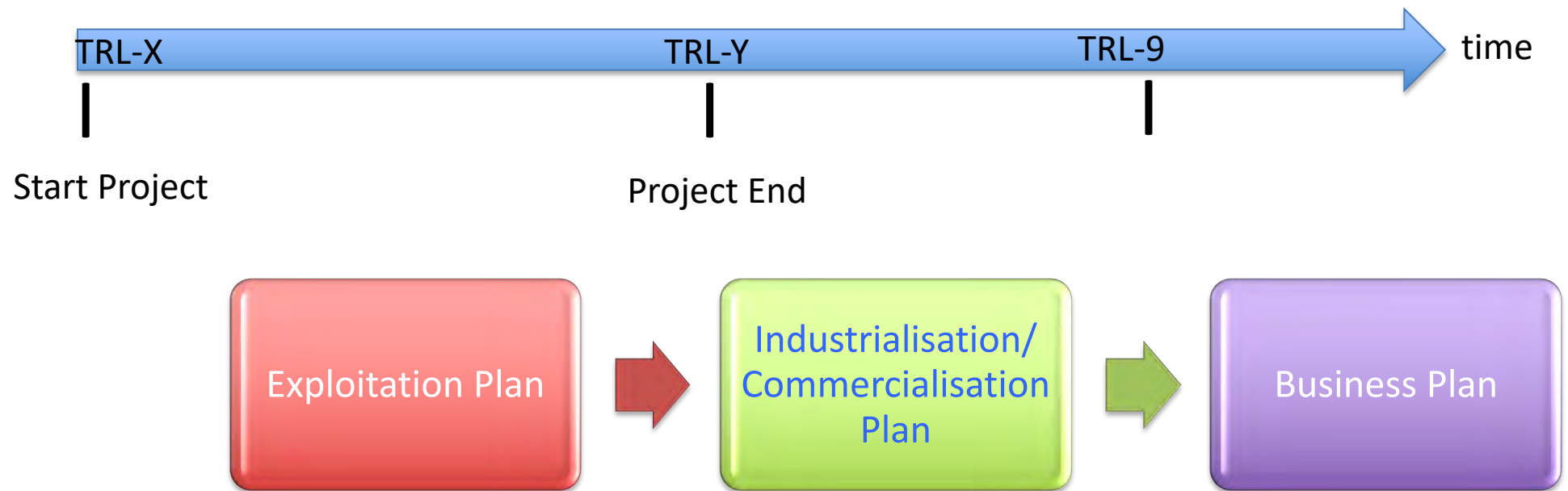


*Any RIA or IA project that at its completion has reached a TRL < 9 should show also at the proposal stage the follow-up steps planned after the end of the project that would lead to TRL 9*



Follow-up exploitation actions after the  
end of project grant  
Industrialisation/Commercialisation  
Strategy

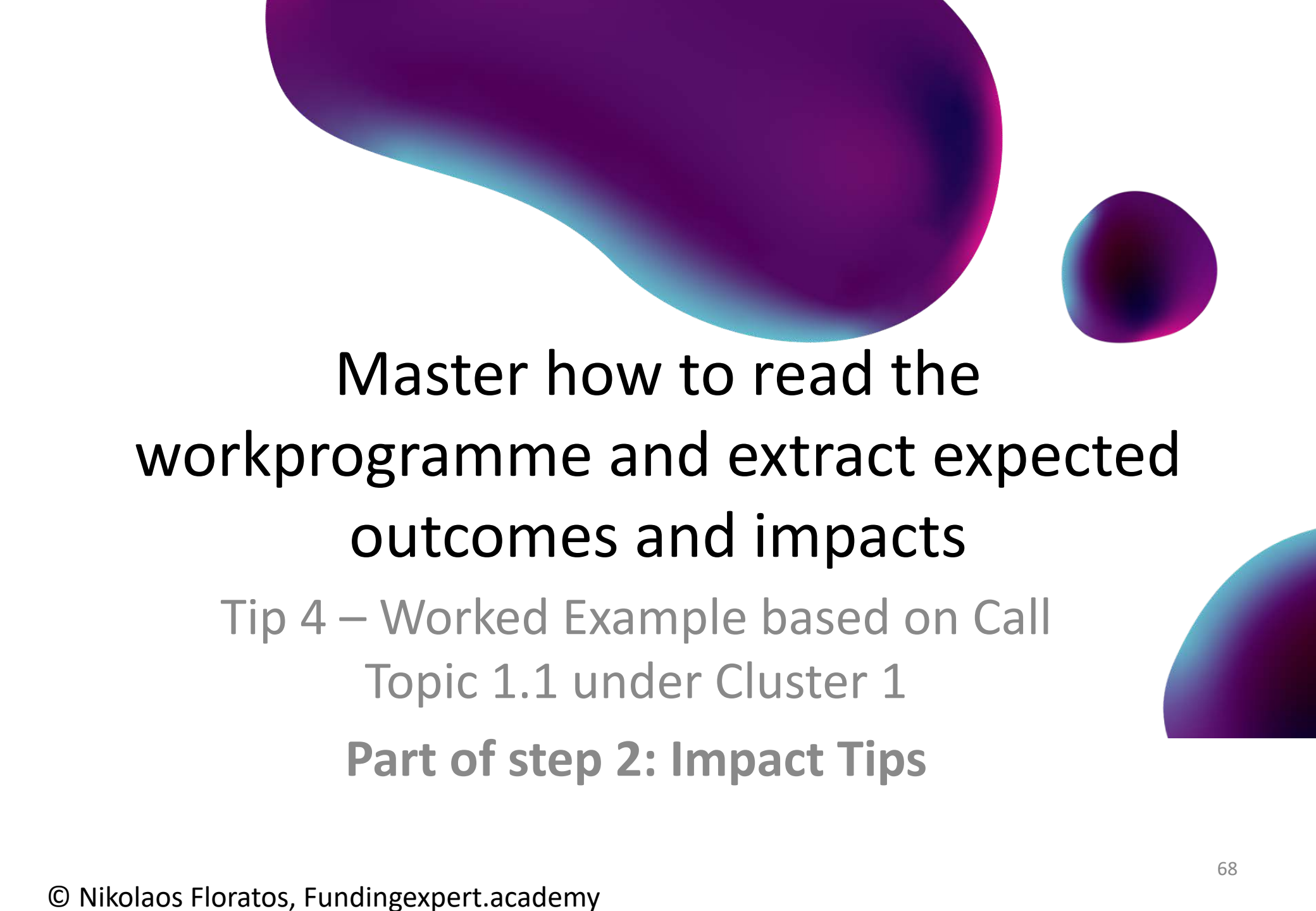
# Innovation Development Cycle



# Example: Industrialisation/Commercialisation Plan

1. *End of project (M48): TRL 6 – Fully functional prototype for testing in operational environment*
2. *End (M48) +M12: TRL 8 - First Trials and bug fixing on the manufacturing process*
3. *End (M48)+M12:TRL 8- Building relationships with clients and revising marketing strategy*
4. *End (M48)+M18: TRL 9 – Establishing a production line and scaling up in european markets*
5. *End (M48)+M24: TRL 9 – Scaling up in international markets*

<u>Action</u>	<u>Result</u>	<u>By Whom</u>	<u>When</u>	<u>Resources</u>	<u>How well</u>
<i>Scaling-up and bug fixing manufacturing processes on TRL6 product</i>	Fully Functional product – TRL8	Company A	M60	In person months and with other actors (e.g. end-users)	Fully functional product at intended environment and scale
<i>Building relationships with clients &amp;revising marketing strategy</i>	List of prospects and revised marketing strategy	Company A, Company B	M60	Pms and other actors (e.g. affiliators)	KPI, e.g. no. of prospects/clients
<i>Establishing a production line &amp; scaling up in european markets</i>	Product of TRL 9 and Penetration in european markets	Company A, Company B, Company C	M66	Pms, Distributors, local support, etc	KPI, expected sales in Europe
<i>Scaling up in international markets</i>	Product of TRL 9 and penetration in international markets	Company A, Company D, Company E	M72	Pms, Distributors, local support, etc	KPI, expected sales outside Europe

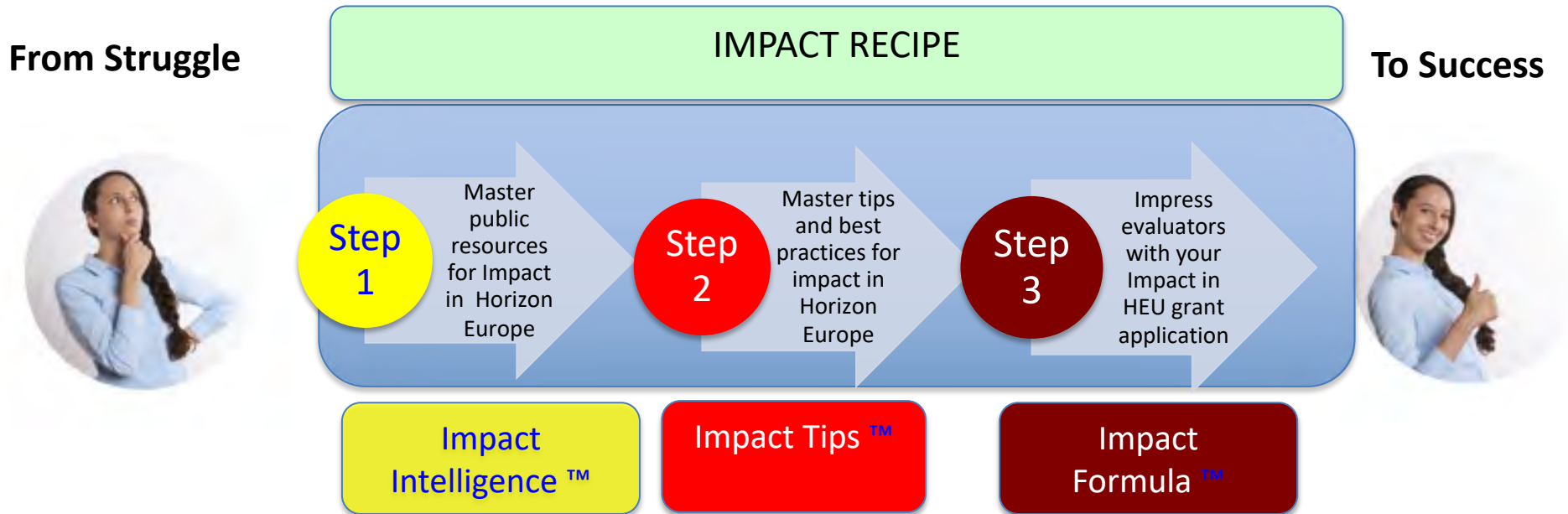


# Master how to read the workprogramme and extract expected outcomes and impacts

Tip 4 – Worked Example based on Call  
Topic 1.1 under Cluster 1

**Part of step 2: Impact Tips**

# HEU Recipe for successful Impact



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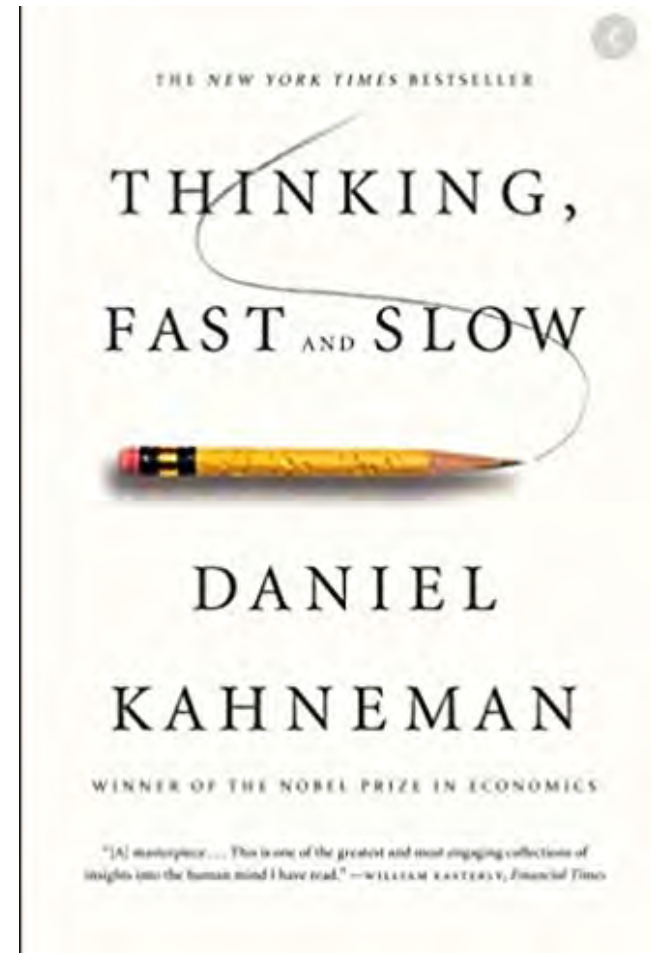
# Impress evaluators by facilitating their evaluation

## Step 3: Impact formula

# The power of “Cognitive Ease”

*When you are in a state of cognitive ease, you are probably in a good mood, like what you see, believe what you hear, trust your intuitions, and feel that the current situation is comfortably familiar.*

*[Daniel Kahneman, Thinking Fast and Slow]*



# Restructuring Impact Section

## Current RIA/IA Impact structure in template

### 2. Impact

#### 2.1 Project's Pathways towards impact

#### 2.2 Measures to maximise Impact DEC

#### 2.3 Summary Table

## Impact Evaluation Criteria in Evaluators' form

*Impact – aspects to be taken into account.*

- Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme, and the likely scale and significance of the contributions due to the project.
- Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities.



# Restructuring Impact Section

## Restructured RIA/IA Impact section structure

### 2. Impact

#### 2.1 Actions towards impact (4 pages)

2.1.1 Actions to achieve expected outcomes (by duration end)

2.1.2 Actions for wider Impact (from destination)

2.1.3 Target Groups

2.1.4 Barriers

#### 2.2 Measures to maximise impact – DEC (- 5 pages)

2.2.1 Dissemination & Exploitation Plan

2.2.2 Communication Plan

2.2.3 IPR Management

2.3 Impact Canvas (Needs, results, DEC measures, target groups, Outcomes, Impacts)

## Impact Evaluation Criteria in Evaluators' form

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# 2.1.1 Actions to achieve expected outcomes

Part of step 3: Impact Formula

## 2.1.1 Actions to achieve expected outcomes

No	Expected Outcomes	Target groups	SRL	Reach	Actions (How and When)	Success Indicators
1	<i>Specific one from call topic (copy and paste)</i>	<i>Stakeholders impacted by expected outcomes</i>	<i>Societal Readiness Level (1-9) by end of project</i>	<i>L/R/N/E /I</i>	<i>How and when our project will achieve the expected outcome (latest by project end)</i>	<i>How can someone confirm that expected outcome achieved</i>
2						
3						
...						

# Restructuring Impact Section

## Restructured RIA/IA Impact section structure

### 2. Impact

#### 2.1 Actions towards impact (4 pages)

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2.3 Impact Canvas (Needs, results, DEC measures, target groups, Outcomes, Impacts)

## Impact Evaluation Criteria in Evaluators' form

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- Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities.

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## 2.1.2 Actions for wider impact

Part of step 3: Impact Formula

## 2.1.2 Actions for wider impact

No.	Expected Impacts	Target groups	Scale	Actions (How and When)	Success Indicators (Significance)
1 2 3	<i>Specific one from WP Destination and related Orientation</i>	<i>Stakeholders affected by expected impact</i>	<i>L/R/N/ E/I</i>	<i>How and when our project will achieve the expected impact (latest 5 years after project end)</i>	<i>How can someone confirm that expected impact achieved</i>
<b><i>Beyond the Expected Impacts</i></b>					
...	<i>Any other scientific Impact (only if measurable)</i>				
...	<i>Any other economic Impact (only if measurable)</i>				
	<i>Any other Social Impact (only if measurable)</i>				
	<i>Any other impact to SDGs (only if measurable)</i>				
...	<i>Cross-sectoral impact: i.e. related to RRI (Gender balance, open science, ethics, science education) - (only if measurable)</i>				
	<i>Impacts to each partner (measurable)</i>	Each partner			

# Restructuring Impact Section

## Restructured RIA/IA Impact section structure

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## 2.1.3 Target Groups

Part of step 3: Impact Formula

# Tangible Target groups

## Consider ALL of the following:

- Value Chain (End-users, Researchers/Academic Community, Developers, Distributors, Suppliers, Support channels, business etc)
- Other knowledge networks (e.g. researchers in other areas)
- Standardisation bodies
- Investors and funders
- Policy advisors (NGOs, expert committees, SIGs, Trade Bodies etc)
- Policy makers (National and european authorities and regulatory bodies)

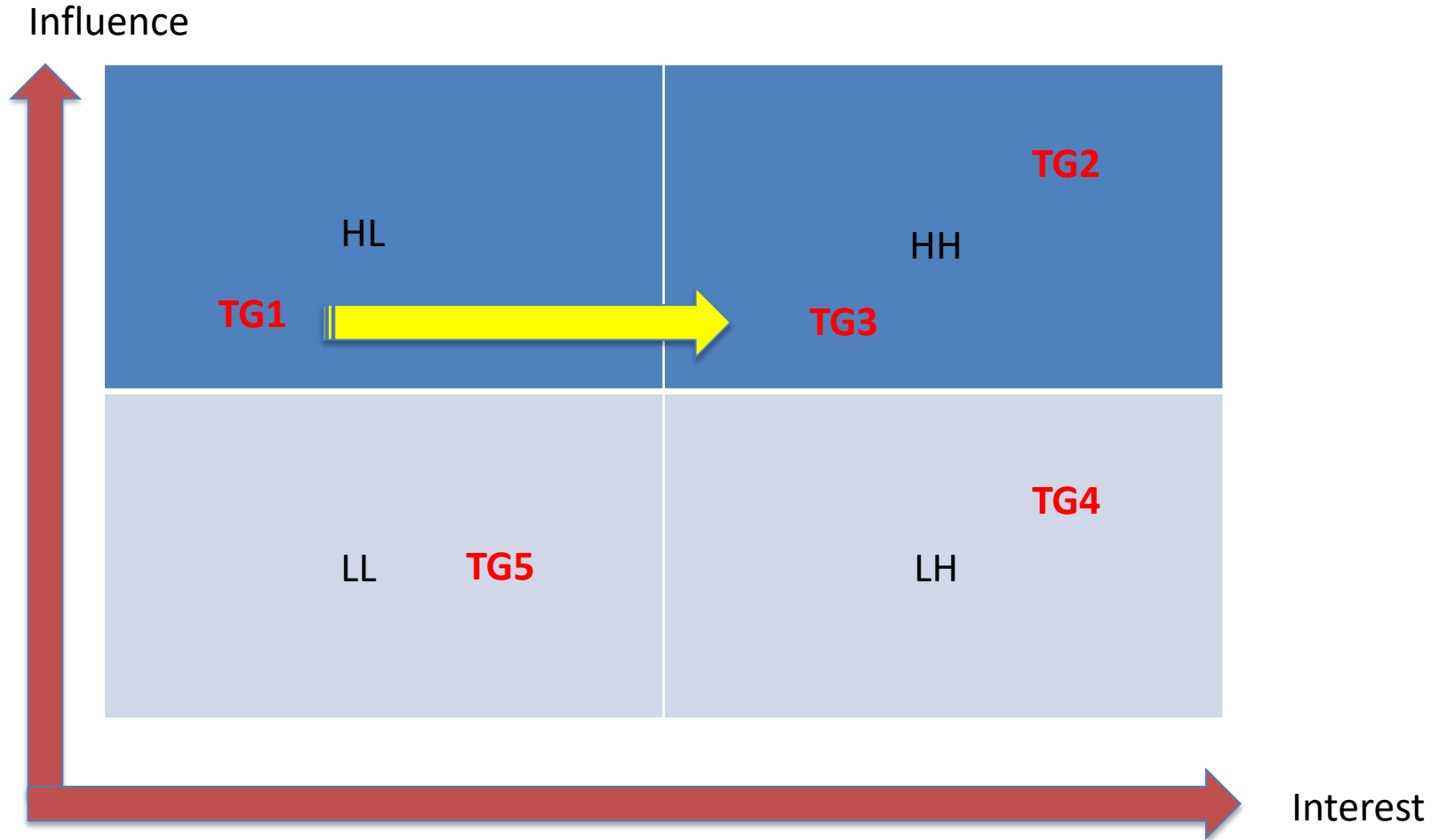
# Tips for specifying project target groups



- Who has interest in our research?
- Who can contribute to our work?
- Who would be **interested** in learning about the project's findings?
- Who could or will be affected directly by research outcomes?
- Who are not directly involved, but could have **influence**?
- Is the audience well defined? E.g. not the “general public” but female citizens commuting by train to work” or not “decision makers” but “Europarlamentarians involved in the design of the new transport policy 2030”

# Target Groups' Analysis

Analyse and describe whom to prioritise/focus and why based on the following table/analysis



# Target Groups' Engagement Strategy

Include the following table for describing how to engage the target groups:

Name	Type	Role	Potential position in the project	Influence level	Interest level	Measures to engage	Engagement indicators

- **Target Group Name (if applicable):** Name of organisation, network, project, or of individual
- **Target Group Type:** End-user, Knowledge creator, Knowledge sharing channel, Solution Developer, Distributor, Supplier, Support channels, adopter of novel solution, Standardisation body, investor/funder, Consumer association, Citizen association, Media, Policy advisor, Policy maker, etc
- **Target Group Role:** e.g. Policy support, advance project visibility & awareness, liaison with end-users external partners and policy actors, share knowledge,
- **Potential position in the project:** e.g. External Expert, Advisory Board member or External Stakeholders Board member, speaker or guest to project event, etc
- **Influence level:** High (H) or Low (L)
- **Interest level:** High (H) or Low (L)
- **Measures to engage:** e.g. Meeting to present and invite stakeholder to join the advisory board, to speak or participate at a project event, etc
- **Engagement indicators:** e.g. xx participations or contributions in advisory board meetings, x participations in project events, etc

# Restructuring Impact Section

## Restructured RIA/IA Impact section structure

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#### 2.2 Measures to maximise impact – DEC (- 5 pages)

2.2.1 Dissemination & Exploitation Plan

2.2.2 Communication Plan

2.2.3 IPR Management

2.3 Impact Canvas (Needs, results, DEC measures, target groups, Outcomes, Impacts)

## Impact Evaluation Criteria in Evaluators' form

### *Impact – aspects to be taken into account.*

- Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme, and the likely scale and significance of the contributions due to the project.
- Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities.

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## 2.1.4 Barriers

**Part of step 3: Impact Formula**

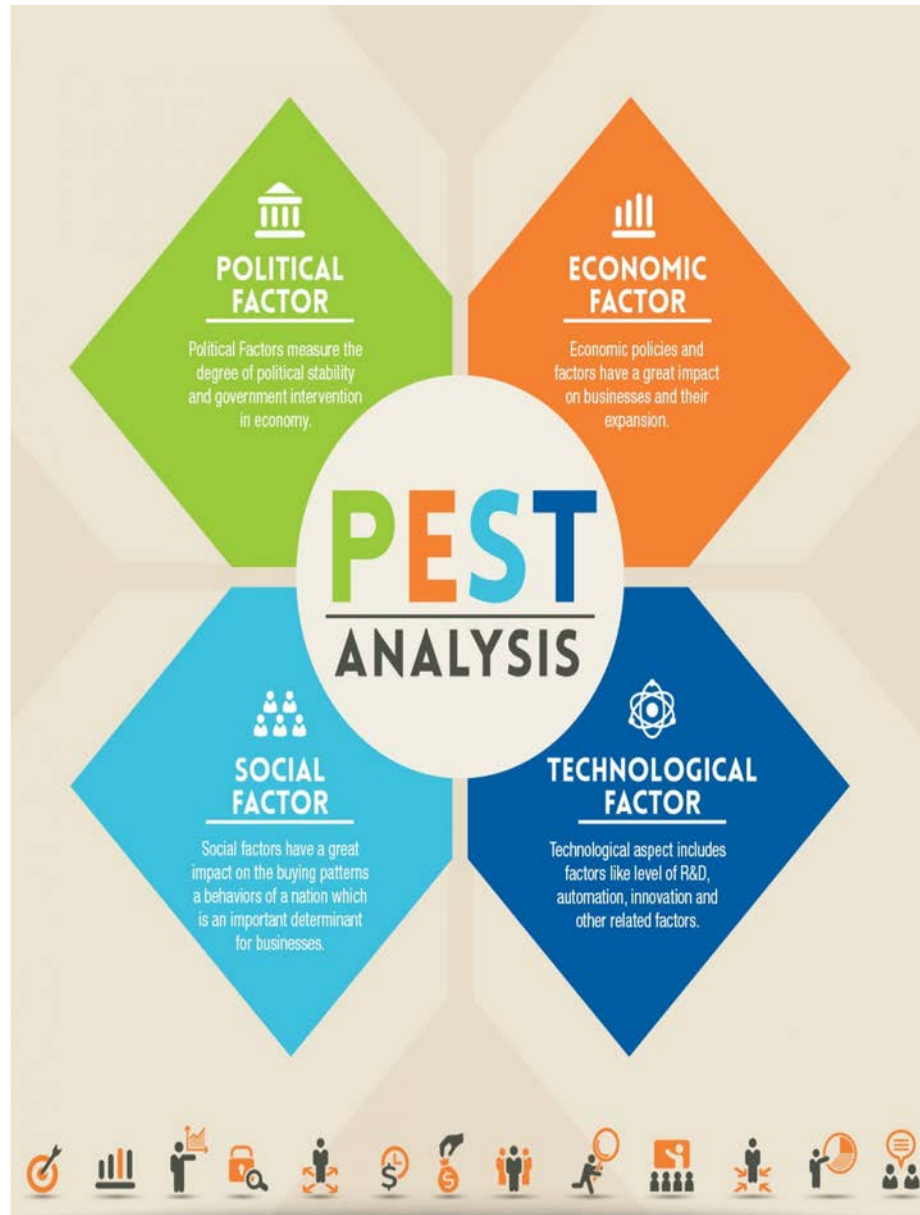
# Possible Barriers & Obstacles – (Under which PESTEL conditions)

This section enhances the overall impression and the credibility of the strategy for achieving the expected impacts and is based on a PESTEL or (PEST) analysis Identifying barriers in the following areas:

- **Political** (e.g. tax policy and trade & tariff controls, regulation/deregulation trends, levels of bureaucracy, likely changes in the political environment, etc)
- **Economic** (e.g. workforce considerations, financing of follow-up steps, market entry barriers, market fragmentation, competitors size, shortage of skills, likely changes in the economic environment, etc)
- **Social** (e.g. population growth rate and age profile, population health, education & social mobility, and attitudes to these, population employment patterns, job market freedom & attitudes to work, press attitudes, public opinion, social attitudes & social taboos, lifestyle choices and attitudes to these, socio-cultural changes such as reluctance to new methods & products, health consciousness, etc)
- **Technological** (e.g. emerging technologies and rate of technological change, standards, RTD activity by other actors, low degree of automation, patent conflicts, etc)
- **Environmental** (e.g. climate change, demand for “green” products, environmental taxes, etc and
- **Legal** (consumer legislation, discrimination legislation, employment legislation, Privacy & Personal data protection legislation, health and safety legislation, etc)



# Impact - Barriers to achieve impacts



# 2.1.4 Barriers

	Possible Barriers	Related Impact (Short term ones/Outcomes & long term ones/expected)	Project Measures to overcome barriers
Political			
Economic			
Social			
Technological			
Environmental			
Legal			

# Impact - Barriers to achieve impacts - Example

Barriers/Obstacles/Regulations/Standards	
DRivE PEST Analysis	
Political Factors	Economic Factors
<p><b>Lack of standardization and regulatory effort or slow progress</b> The development of smart grids and DR in Europe is tied with the development of adequate Standards and Regulation. Lack of supporting regulations is the main reason for low penetration of explicit DR schemes in countries like Italy and Spain. Although DRivE is designed to adapt to different market maturity conditions and is adopting USEF, which supports and accelerate the development of smart grid Standards, slow progresses in the development of Standards and Regulation may limit the exploitation potential of the DRivE solution. To cope with this, part of the dissemination strategy includes a mutually-beneficial collaboration with members of USEF and members of the Smart Grid Task Force.</p> <p><b>Misperceptions of information about DR market evolution</b> Misinterpretation of the DR market evolution in Europe has the potential risk to create an obstacle for the exploitation of the DRivE solution. To account for this, DRivE includes within the consortium partners from different EU countries with policy-making influencing capacities and currently working at different levels in the energy value chain. Furthermore, as part of the project activities, great efforts will be allocated to market analysis and watch activities, seeking for the most suitable environment for the penetration of the DRivE solution across Europe.</p>	<p><b>Minimal financial incentives</b> - Incentives for market players are not always well aligned to ensure that the most efficient, flexible solution is chosen, while the financial incentives offered to customers in exchange for changes to the way they consume electricity are not big enough.</p> <p><b>Missing Markets</b> - New forms of flexibility offer benefits to many actors in the energy system, but these benefits are not all monetized. This means providers of flexibility do not realize their full value, undermining their investment business case. In addition, there can also be challenges in capturing the value of flexibility in existing markets.</p> <p><b>Cost Reflectivity</b> - Consumers / generators are not always exposed to the true whole system costs of energy generation, transport and consumption which may weaken the case for them adopting more flexible solutions or realising their existing flexibility.</p> <p><b>Market Power</b> - Existing energy market players have significant influence through existing policy and regulatory processes which may make introducing new business models and ways of doing things more challenging. DRivE will address these challenges building innovative business models based on the consortium value chain experience with the main criteria of creating fair opportunities of the involved stakeholder.</p>
Social Factors	Technological Factors
<p><b>Difficulty to reach customers and stakeholders, especially in partially-developed DR markets</b> Profitability of the DRivE solution depends on number of DR services available in a given country and willingness of building managers and occupants to participate in DR programs. In countries with not developed DR markets the limited profitability of the DRivE solution may result in longer paths to market and difficulties in reaching determined customer segments (in particular residential ones). To mitigate this risk, as part of WP7 DRivE will develop a concrete Plan for the Exploitation and Dissemination of Results (PEDR) with the inclusion of an exploitation roadmap and business plan for the DRivE solution targeting specifically this issue.</p>	<p><b>Technical barriers and cost overrun</b> DRivE aims at providing a low-cost solution for implementation in commercial and residential buildings. The project addresses all the possible technical challenges: cost-effective solutions for DR automation, good practices for DR technology deployment in the building, user engagement incentives, building's comfort characterization, flexibility management, hierarchical, modular, plug and play, multivendor, interoperable and standard compatible solution. Although the solution is based on existing technologies provided by industrial partners, unexpected technical barriers may arise when integrating the solution and implementing it in new and variegated contexts. A careful planning of implementation activities (data collection, detailed use-cases definition, pre-testing) and</p>

## Barriers - Examples

	<b>Barrier</b>	<b>How OACTIVE will help on its reduction</b>
<b>Economic</b>	Lack of suitable financing mechanism for further commercialization, inadequate governmental or private support, limited access to funding.	Consortium partners will highlight benefits generated by the novel models at the project's dissemination events where ministries of health, national and EU authorities, funding bodies, private equity firms, venture capitals will be invited. The project's objectives and results will be also presented by consortium partners at conferences and trade shows will attend.
<b>Market</b>	Conservatism of medical care market and hesitation by patients to adopt new treatments and products.	Communication campaign will deliver clear and consistent messages to general public and authorities in a way that they can be understood by non-specialists, while the AR-driven treatments will facilitate a more enjoyable experience allowing a wider acceptance of the OACTIVE technology. Dissemination activities targeting medical actors and the scientific community will highlight the project's benefits. Concrete certification policy will increase social acceptance.
	Lack of skilled and experienced health providers in medical care industry	Development of 2 advanced technological training seminars for health providers (D10.2)
	Complexity of public and private medical care European markets, too many stakeholders involved.	One workshop and one conference will be organized by the consortium as part of its dissemination and exploitation strategy where public authorities, private hospital owners' associations, medical care equipment companies, regulators, EU healthcare platforms, medical associations, the research community, market actors and investors will be invited and will be asked to exchange their thoughts and perspectives.
	Possibility of an emerging rival development using similar technology	Strong dissemination and exploitation plan highlighting OACTIVE unique selling points, Robust IPR policy.
<b>MNGM</b>	Bad selling policies, weak and neglected after-sales service, ineffective marketing approach and education campaigns	The OACTIVE business cases will work as a driver / guide for interested investors. New international value chains will be also created.
<b>Policy</b>	Legal issues, data confidentiality	Authentication mechanisms (via X.509 certificates) assuring the secure access to data, pseudo-anonymization of clinical data, specific algorithms for data aggregation prevention and patient-centred authorisation mechanisms will be developed.

# Restructuring Impact Section

## Restructured RIA/IA Impact section structure

### 2. Impact

#### 2.1 Actions towards impact (4 pages)

2.1.1 Actions to achieve expected outcomes (by duration end)

2.1.2 Actions for wider Impact (from destination)

2.1.3 Target Groups

2.1.4 Barriers

#### 2.2 Measures to maximise impact – DEC (- 5 pages)

2.2.1 Dissemination & Exploitation Plan

2.2.2 Communication Plan

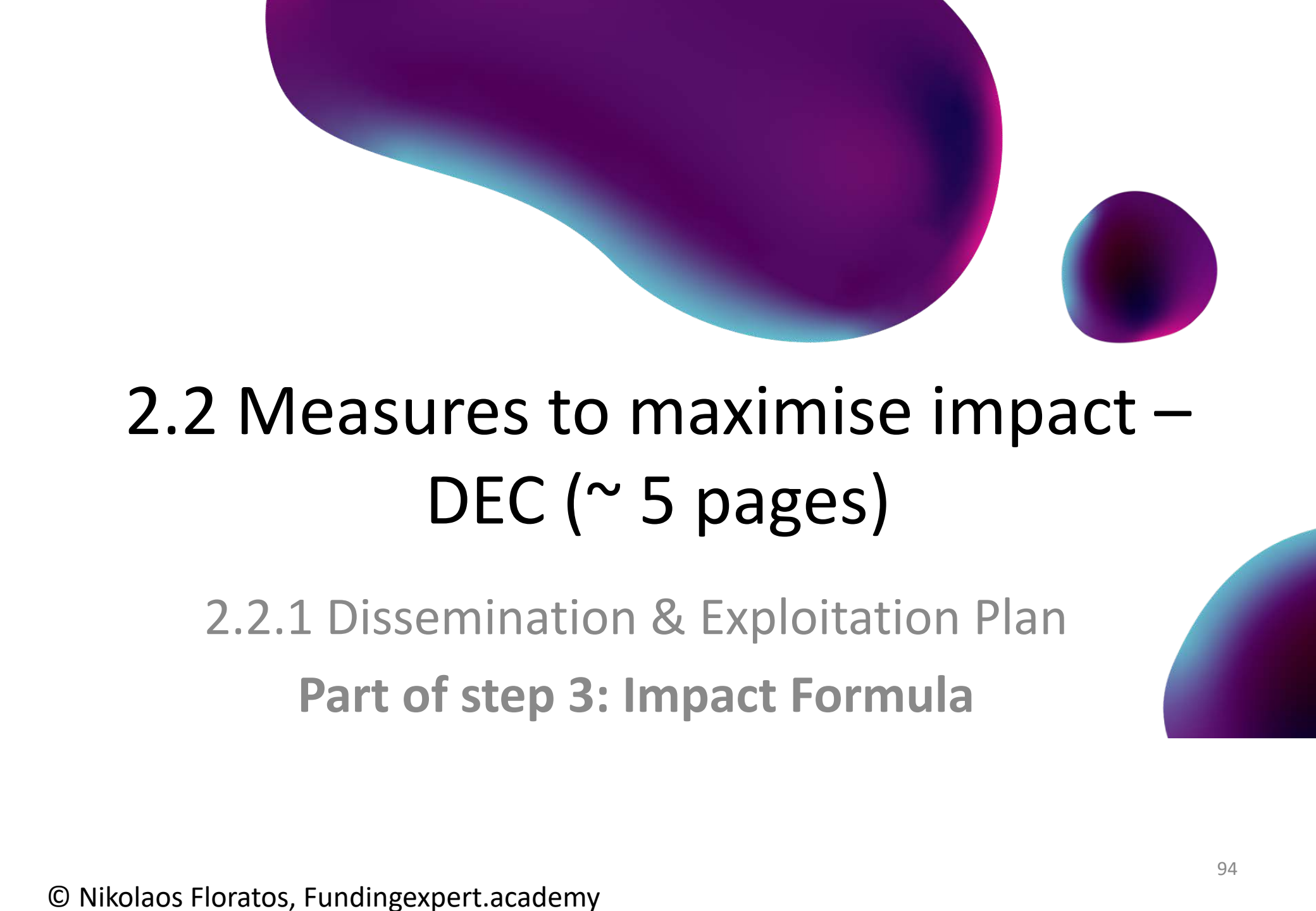
2.2.3 IPR Management

2.3 Impact Canvas (Needs, results, DEC measures, target groups, Outcomes, Impacts)

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### *Impact – aspects to be taken into account.*

- Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme, and the likely scale and significance of the contributions due to the project.
- Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities.



## 2.2 Measures to maximise impact – DEC (~ 5 pages)

### 2.2.1 Dissemination & Exploitation Plan

#### **Part of step 3: Impact Formula**

## 2.2.1 Dissemination and Exploitation Plan (Incl. IPR)

Dissemination & Exploitation **Strategy** =  
Dissemination & Exploitation Action **Plan**

**Plan means a table**

## 2.2.1 Dissemination and Exploitation Plan

<u>What</u> to be disseminated & exploited (Results)	To <u>Whom</u>	<u>How</u> Method	*Barriers	By <u>Whom</u>	How <u>much</u> ?	**How <u>well</u> ?
Product 1						
Product 2						
...						
Services						
Know-how						
...						

Possible substitutions: “How much” with “Phase/Months” period, “How much” with “Intensity: Strong/Moderate/Low  
 “Related Expected Impact” with Focus/why

- ✓ \*Barriers/Under which conditions (whenever applicable): e.g. when a specific regulation is adapted, critical mass achieved, specific collaborators on board (if 2.1.4 is missing)
- ✓ \*\*Examples of “How well”: Dissemination & Exploitation Milestones



## 2.2.1 What to be disseminated and exploited

Focus on project results

- Products (materials/model structures, algorithms, software, designs, prototypes, demonstrable products/versions, pre-commercial products/versions, commercialised products/versions, etc )
- Services (training, consultancy, advising, etc)
- Know how (policy recommendations, research data, methodology, new research topics relevant to industry needs, etc)

## 2.2.1 Dissemination and Exploitation

### Deliverable to advance innovation capacity

- Innovation capacity: Support externals (outside the consortium) and internals (partners) to advance the achieved project innovations.
- Introduce a “Dissemination of Innovation **Handbook**” as one of the dissemination outcomes/deliverables that includes
  - lessons learned during the project implementation
  - what worked well, what didn't work well
  - step-by-step approach on how project innovations have been achieved and
  - Expects to support other players in the same industry to achieve and advance similar innovations and integrate the developed innovations

## 2.2.1 To Whom-Stakeholders

- Value Chain (End-users, Researchers, Developers, Distributors, Suppliers, Support channels, etc)
- Other knowledge networks (e.g. researchers in other areas)
- Standardisation bodies
- Investors and funders
- Policy advisors (NGOs, expert committees, etc)
- Policy makers (National and european authorities and regulatory bodies)

# 2.2.1 How – Dissemination & Exploitation methods

	Possible HEU D&E Methods							
Exploitable Results	1	2	3	4	5	6	7	8
<b>Products</b> (materials/model structures, algorithms, software, designs, prototypes, demonstrable products, pre-commercial products, commercialised products, etc )	x	x	x	x			x	x
<b>Services</b> (training, consultancy, advising, etc)	x	x			x	x		x
<b>Know how</b> (policy recommendations/roadmaps, research data, methodology, new research topics relevant to industry needs, etc)				x	x	x		

## Possible HEU D& E methods:

- 1) indirect exploitation through MTAs (Material Transfer Agreements), licensing and finding licensees,
- 2) direct exploitation through spin-offs (startups for growing) and spin-outs (for selling licenses),
- 3) raising further funds with externals (investors) and/or internals (own funds) for reaching higher TRL via spin-offs, e.g. TRL 9 ,
- 4) partnering for further developments and improvements and reaching higher TRL,
- 5) advising technology, policy or standardisation committees,
- 6) specialised provision of services,
- 7) protecting IPs via filing patents & trademarks and managing copyrights,
- 8) Identifying & engaging sales channels or distribution partners

## 2.2.1 By whom and How much

- For each D&E activity in the *How Method column*, assess with evidence which partners (can) have direct access to the target groups of the D&E strategy (i.e. To whom)
- Allocate them these suitable activities
- Assess the resources needed for implementing these activities a) during the project stage and b) aligned with project budget for D&E

## 2.2.1 How well-Examples of measuring D&E achievements (D&E milestones)

D&E milestones (How well) are directly linked with D&E activities (How – method)

- Expected no. of potential funders interested in
- Expected transference of research into practice (e.g. no. of patents or ™ filed, no. of prototypes produced, no. of licenses issued, etc)
- Expected no. and turnover of new products
- Expected no. of practices or procedures developed, based on project research/innovation outcomes
- Expected no. of agreements with stakeholders to use project results (especially for open access based results),
- Expected no. of downloads (especially for open access based results),
- Expected no. of standards initiated
- Expected no. of any policy committees involved

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- Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme, and the likely scale and significance of the contributions due to the project.
- Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities.



## 2.2.2 Communication Plan

Part of step 3: Impact Formula



# Communication Strategy Success factors

- Inclusion of a separate workpackage/activity on communication
- Communication is a continuous process that starts by the beginning of the project
- All consortium partners are involved (and their respective staff including researchers)
- Ensure professional expertise in communication (better internal)
- Cooperate with EC for amplifying project's message
- Prepare a concise and easy to follow communication plan

# Communication **Plan**

Communication **Strategy** = Communication Action  
**Plan** - CAP

**Plan** means a **Table**

# 2.2.2 Communication Plan Structure

<u>What</u> to be communicated	To <u>Whom</u>	<u>How</u> (Communication Methods)	Communi- <u>cation</u> <u>Level</u> (L/R/N/E /I)	<u>When</u>	By <u>Whom</u>	How much? ( <u>Resources</u> Needed)	Communica- <u>tion</u> <u>Milestones</u>

## 2.2.2 Communication Plan – what to be communicated

- Project expectations
- Project activities
- Project achievements
- Lessons learned
- Project deliverables (public ones)

## 2.2.2 Communication Plan – To whom

- Project Stakeholders
- Policy Advisors (NGOs, european associations, etc)
- Policy Makers (EC, European Parliament, International organisations, public authorities/ministries etc)
- Press/Media
- Citizens, Public audience

# 2.2.2 Communication Plan/Methods

Communication Methods	1	2	3	4	5
Knowledge sharing, peer-reviewing, exchange of links, co-organisation of events	X	X	X		
EC communication services (e.g. Cordis, Euronews)	X	X	X	X	X
Newsletters, Leaflets & Brochures (different versions per target), posters, gadgets	X	X	X	X	X
SM: - You tube channel (interviews with end-users, use case scenarios, stories etc)	X	X	X	X	X
SM: - Linkedin groups (better join related groups than create ones)	X	X	X		
SM: - Facebook groups	X		X		X
SM: - Imagery e.g. flickr, instagram & pinterest suitable for quotes related to the project	X	X	X	X	X
SM: - twitter (no account but use #projectname and #H2020 in tweets)	X	X	X	X	X
Events ( Organising or presenting)	X	X	X	X	
Campaigns (e.g.on related International Days) and on EU presidencies	X			X	X
Website and blog	X	X	X	X	X
Traditional media (TV, radio, press)	X			X	X
Industry/Research related magazines (see Cordis) as well as in scientific journals		X	X		
Competitions & prize/awards ceremonies	X	X			X
Wikipedia entries	X	X	X	X	X
Dinners with key actors (e.g.Policy Makers, MEPs)				X	
Free training (f2f or via webinar) or games and mobile apps	X	X	X		X
Zenodo.org – plattform for releasing and citing open data		X	X	X	

**1: End-users, 2: Research & Industry Actors, 3: Policy Advisors, 4: Policy Makers, 5: Public**

## 2.2.2 Communication Plan - By whom and How much

- For each communication activity in the *How Method column*, assess with evidence which partners (can) have direct access to the identified target groups (i.e. To whom)
- Allocate them these suitable activities
- Assess the resources needed for implementing these activities a) during the project stage and b) aligned with project budget for communication

## 2.2.2 How well-Examples of measuring Communication achievements/ milestones

Communication milestones (How well) are directly linked with communication activities (How – method). E.g

- Expected no. of external sources referencing project website
- Expected no. of Cordis references
- Expected no. of dissemination material distributed
- Expected no. of youtube subscribers or video views
- Expected no. of comments received to project posts in linkedin groups, facebook groups and pages
- Expected no. of twitter posts re-tweeted
- Expected no. of special target group(s) in our event(s)
- Expected no. of campaigns supported by traditional media
- Expected no. of project website unique visits per month
- Expected no. of articles in scientific journals or related magazines
- Expected no. of candidates in project competitions (e.g. for logo)
- Expected no. of policy makers/advisors in our event(s)
- Expected no. of participants in our training
- Expected no. of project mobile apps downloads



# Example of Communication Plan

Information communicated	Target group	Means of communication	Com/ition level	When	Responsible	Performance indicators
Objectives and basic information on project, public deliverables	Healthcare industry, OA patients, policy makers, stakeholders	Project's website	International	M1-M36	AXIA	30000 visits and 500 downloads per public deliverable one year after the project's end
Project's activities	End users, authorities, OA patients and relatives	Newsletter, Social media (fb page, LinkedIn groups, twitter hashtag)	International	M1-M36	AXIA	300 registered mails, 500 likes on fb page, 50 LinkedIn posts and 50 twitter tweets per year
Achievements	General public, Investors	2 YouTube promotional videos, leaflets	Europe	M3, M36	AXIA	1000 views per video in 12 months from release
Lessons learnt	Healthcare industry, advisors	Best practices handbook (D9.3)	Europe	M36	AXIA, CETRI	200 downloads in 1 year after the project's end
Publications	Researchers, Research centers	High impact journals (table 2.3)	International	M36	All partners	6 publications and 6 citations in 3 years

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## 2.2.3 IPR Plan

**Part of step 3: Impact Formula**

# IPR Principles

In order to disseminate and allow the use of project results during and after the project, first one factor should be clarified/clear:

1. The Ownership Model (or Intellectual Property Rights - IPR): Who owns what from the project results and under which conditions

# IPR Principles

## Indicative Ownership Models

- Open Access to results by everyone (Check Creativecommons.org, open source, etc)
- Ownership of a result by one single entity
- Joint Ownership of each result based on pre-arrangements (based on effort or budget per partner in the project or in the related WPs)

N.B.: Each result can follow a different ownership model

For more info check [www.iprhelphdesk.eu](http://www.iprhelphdesk.eu)

# Open Research Data Impact



- Lead to new and unanticipated discoveries and provide research material for those with little or no funding (Researchers or SMEs)
- Advance transparency and credibility of research results
- Stimulate new types of thinking as researchers especially outside the project can develop new understandings by bringing together data from a variety of sources

## 2.2.3 IPR

<u>What</u> to be disseminated & exploited (Results)	IPR
Product 1	
Product 2	
...	
Services	
Know-how	
...	

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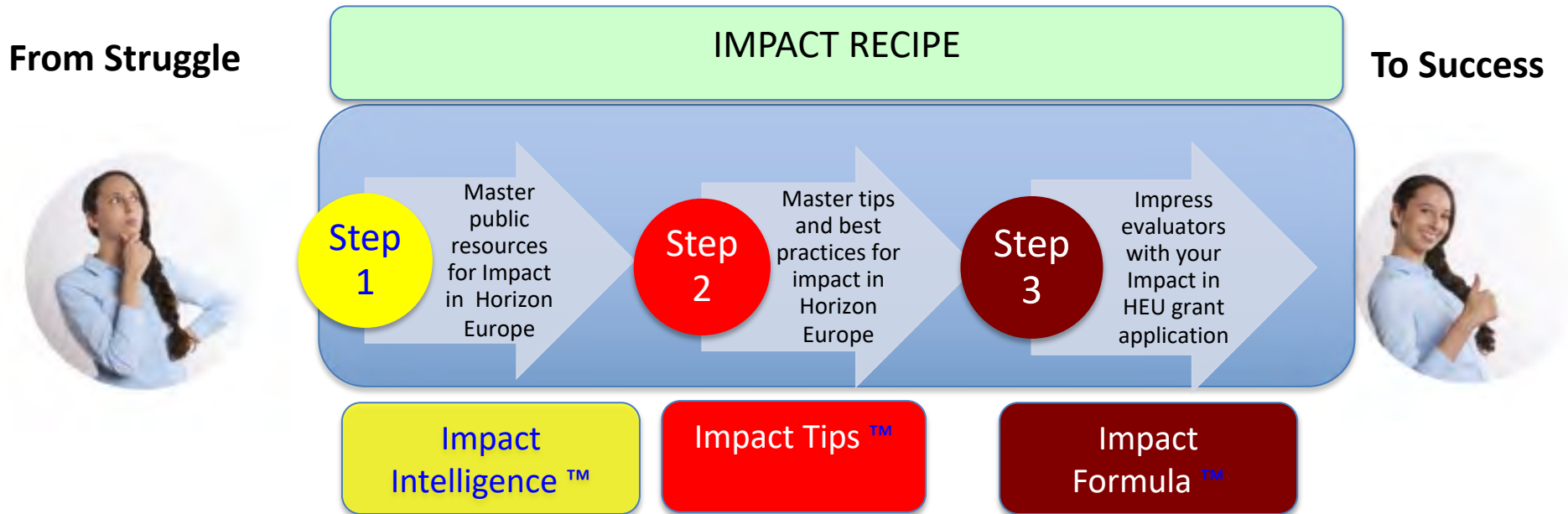
## 2.3 Impact Canvas

Part of step 3: Impact Formula

# 2.3 Impact Canvas

Specific Needs	Expected Results	DEC measures
<i>What are the specific needs that triggered this project?</i>	<i>What do you expect to generate by the end of the project?</i>	<i>What dissemination, exploitation and communication measures will you apply to the results?</i>
Challenge 1	Result 1 (R1)	D&E Activity 1 D&E Activity 2 Communication Activity 1 (if R 1 is publicly accessible)
Challenge 2, Challenge 3	Result 2 (R2)	D&E Activity 2 D&E Activity 3 Communication Activity 2 (if R 2 is publicly accessible)
Target Groups	Outcomes	Impacts
<i>Who will use or further up-take the results of the project? Who will benefit from the results of the project?</i>	<i>What change do you expect to see after successful dissemination and exploitation of project results to the target group(s)?</i>	<i>What are the expected wider scientific, economic and societal effects of the project contributing to the expected impacts outlined in the respective destination in the work programme?</i>
TG 1 to benefit/use R 1 TG 2 to benefit/use R 1 TG 3 to benefit/use R 1	Quantified Outcome 1	Quantified expected scientific/Economic/Societal impact 1
TG 1 to benefit/use R 2 TG 4 to benefit/use R 2	Quantified Outcome 2, Quantified Outcome 3	Quantified expected scientific/Economic/Societal impact 2

# HEU Recipe for successful Impact





# Congratulations!

You did it! You are familiar now on how  
to start exploiting Horizon Europe as a  
beginner

# Applied Knowledge is power

**Knowledge is not power, applied knowledge is**

Practice NOW and apply what you learned in class, e.g. select any of the ones below:

1. Check the WP introduction and the related Orientations documents section and try to identify further info related to the expected Impacts of your targeted call (see slide 39)
2. Identify questions for quantifying the current status related to the expected outcomes (see slide 43)
3. Select one topic in Horizon Europe identify actions to achieve the expected outcomes based on slide 76
4. Select one call topic in Horizon Europe and identify actions to achieve the expected impacts based on slide 79
5. Prepare an Engagement Strategy of your target groups based on slide 85
6. Outline Barriers for achieving your expected impacts based on slides 90-92
7. Prepare a Dissemination and Exploitation Plan based on slides 96-102
8. Prepare a Communication Plan based on slides 107 – 113
9. Prepare an Impact canvas related to your targeted call topic based on slide 122



# Who is Nikolaos Floratos



- **Founder** of Funding Expert Academy ([www.fundingexpert.academy](http://www.fundingexpert.academy)) with programmes that master individuals in EU funding programmes and advance successful **proposal developers** across Europe
- **Active** in European funding industry since 1997 (**24+ years**)
- **EC expert/evaluator** since 2003 (**18+ years**)
- **Author** of the ebook “Learn from the Horizon 2020 champions” downloadable from [www.NikolaosFloratos.com](http://www.NikolaosFloratos.com)
- **Trained and coached hundreds** of organisations and thousands of professionals on exploiting successfully EU funds and advancing their sustainability
- Globally **recognised** as one of the **most influential** and **inspiring speakers** and **trainers** in European Research & Innovation with hundreds of speeches and trainings in 30+ countries including overseas
- **2000+** LinkedIn recommendations and endorsements at <https://www.linkedin.com/in/floratos/>
- Organiser and host of the Horizon Europe virtual summit ([www.horizoneuropesummit.eu/](http://www.horizoneuropesummit.eu/)) with training sessions by 35 top experts in Horizon Europe actions and topics
- **Multidisciplinary** educational background with **four university** degrees (B.Eng, BA, M.Sc, MBA)
- Passionate with training and evangelist of “**Anyone** can achieve **anything** with the proper training & coaching”
- **Phd** Researcher in student **engagement** and **online courses**.
- **Master in decomposing complex concepts** into easily to understand and apply step-by-step recipes



# Connect with me at

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No. 1 Funding Expert | Research & Innovation Coach | Trainer | International Speaker |

**Nikolaos Floratos**

Research & Innovation coach | Horizon 2020 | Horizon Europe | EC Expert | Trainer | EU funding expert | International Speaker  
Ilion, Attiki, Greece · Contact info

Funding Expert Academy  
Universitat Oberta de Catalunya

500+ connections

Open to Add section More

Share that you're hiring and attract qualified candidates. × Show recruiters you're open to work — you control who sees this. ×

Your Dashboard All Star  
Private to you

545 Who viewed your profile 325 Post views 116 Search appearances

Manage my network  
Access and manage your connections, events and interests all in one place

My items  
Keep track of your jobs, courses and articles

About

►23+ years experience in R&I grant applications | 17+ years as EC expert/evaluator | 12+ years as R&I coach and trainer | 5000+ researchers trained and coached in 45+ countries | 500+ linkedin recommendations & endorsements | PhD research on student engagement | 4 University degrees (B.Eng, B.A, M.Sc, MB ... see more)

Featured

Such comments motivate me to try even harder and confirm my passion for my jo...

How to think and act like a champion

ACT and THINK like a champion and transform your personal and...

Horizon Europe  
Horizon Europe E  
The single-poi wishing to expl

27 · 2 comments