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D1.1 OPERATIONAL MANUAL OF PROCEDURES

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Executive Summary

Drawing upon the considerable expertise of the partners engaged in the process, the OPERATIONAL MANUAL ON TOOLS AND SERVICES has been developed. The approach implemented for the Facility's services is based on proven methodologies and draws on the experience gained from previous EU-funded projects, including the Horizon Results Booster and AAL2Business. Emphasis has been placed on a demand-driven, modular framework to provide adaptability and effectively address the evolving needs of beneficiaries. The methodology incorporates Lean Startup concepts, strategic planning instruments, and structured coaching models to facilitate the advancement of research results towards greater maturity and real-world application. The Work Package Leaders have reached consensus regarding the parameters and indicators that determine beneficiaries' access to the various services and options available within the widerAdvance Facility.

The purpose of the Operational Manual is to organise and comprehensively outline the procedures and implementation processes for each service provided under the widerAdvance Facility. This document serves as an authoritative guide for applicants, beneficiaries, service providers, and project partners. Each section addresses the following elements:

- the scope of suport
- access procedures
- workflow methodologies

Through the provision of clear guidelines and operational transparency, the Facility seeks to systematically identify and support high-potential research outcomes, facilitating their successful transition and deployment beyond the boundaries of their initial projects.

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List of Acronyms

KERs	Key Exploitable Results
KAMs	Key Account Managers
D&E	Dissemination and Exploitation
SDP	Service Delivery Plans
RTs	Research Teams
RMAs	Research Management & Administration
UVP	Unique Value Proposition
ppt	Power point template
IP	Intellectual Property
TTOs	Technology Transfer Offices
NDA	NON-DISCLOSURE AGREEMENT
IPC	International Patent Classification
CPC	Cooperative Patent Classification
FTO	Freedom to Operate
BATNA	Best Alternative to a Negotiated Agreement
DCF	Discounted Cash Flow
EWD	Effective Working Days
SDOs	Standardisation Development Organizations
TCs	Technical Committees
WGs	Working Groups
NWI	New Work Items
CWA	CEN Workshop Agreement
ML	Mutual Learning
ORs	Outermost Regions
MEP	Members of the European Parliament
ITRE	Industry, Research and Energy
ERDF	European Regional Development Fund
RRF	Recovery and Resilience Facility
HE	Horizon Europe
ARL	Adoption Readiness Levels
KPI	KEY PERFORMANCE INDICATOR
TRL	Technology readiness level
VC	Venture Capital
CRM	Customer Relationship Management
HE MGA	Horizon Europe Model Grant Agreement
ESF	European Social Fund

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1. Introduction

The *WiderAdvance Facility* has been established to support the effective dissemination and exploitation of research results generated under Horizon 2020 and Horizon Europe Widening Actions. Through a comprehensive portfolio of services, organisations based in Widening Countries and Outermost Regions are enabled to enhance the visibility, maturity, and impact of their Key Exploitable Results (KERs).

This **Operational Manual** has been developed to provide detailed guidance on the structure, procedures, and implementation of services delivered under the Facility. The document is intended for all stakeholders involved in the delivery and management of these services, including service providers, Key Account Managers (KAMs), and consortium partners. Each section outlines the scope of support, access procedures, and workflow methodologies associated with individual and group services such as the D&E Academy, capacity building webinars, intellectual property assistance, standardisation support, matchmaking preparation, and synergy coaching.

A single Open Call mechanism has been designed as the entry point for all service applicants. Instead of multiple independent calls, a centralised system with recurring cut-off dates has been adopted to streamline access, enhance coordination, and ensure a balanced allocation of resources. Applications are assessed by designated KAMs, and tailored Service Delivery Plans are developed accordingly. Throughout the process, beneficiaries are guided by structured criteria and consistent standards to ensure service quality and alignment with project objectives.

The methodology adopted for the Facility's services is grounded in established practices and has been informed by prior EU-funded initiatives such as the Horizon Results Booster and AAL2Business. A demand-driven, modular approach has been prioritised to ensure flexibility and responsiveness to beneficiary needs. Lean Startup principles, strategic planning tools, and structured coaching frameworks are employed to support the progression of research outputs toward higher levels of maturity and practical application.

This manual serves not only as a procedural guide, but also as a strategic framework for collaboration, learning, and innovation uptake. By providing clear instructions and operational clarity, the Facility aims to ensure that high-potential research results are systematically identified, supported, and positioned for successful deployment beyond the scope of their originating projects.

Linking Operational Procedures to Policy Recommendations (Milestones M24 and M46)

While this Operational Manual is primarily designed to guide the delivery of services offered through the widerAdvance Facility, it also plays an important role in laying the foundation for the policy recommendations that will be developed later in the project—specifically at milestones M24 and M46. Although this connection may not be immediately obvious, the procedures and tools described throughout the manual are, in fact, key building blocks for shaping those future recommendations.

As the project unfolds, a wealth of data will be collected from the implementation of services such as the D&E Academy, support for IP management and standardisation, matchmaking preparation, and synergies coaching. This includes maturity assessments of Key Exploitable Results (KERs), participant feedback, expert evaluations, and service outcomes. These elements are not only critical for delivering high-quality support but also serve as evidence of what works, what doesn't, and where improvements are needed across different regional and institutional contexts.

This information will be systematically analysed as part of the barrier analyses scheduled at M24 and M46. The goal is to understand the real-world challenges faced by research teams and organisations when trying to bring their results closer to adoption—be it by policy, industry, or the broader society. We'll also look at what kinds of services, tools, or conditions helped make a difference. This evidence-based approach will help ensure that the policy recommendations we develop are grounded in actual experience—not theory alone—and are therefore more likely to be relevant and actionable.

Moreover, because the Facility is specifically geared towards organisations in Widening Countries and Outermost Regions, the data we collect will offer valuable insight into the unique structural, financial, and operational barriers these regions face. By identifying patterns across different services and geographies, we can contribute not just to the improvement of this Facility, but also to the broader European policy conversation on how to better support knowledge valorisation and research uptake in these regions.

Ultimately, this means that the procedures outlined in this manual do more than support the day-to-day delivery of services—they are integral to the project's long-term vision of informing and shaping policies that foster a more inclusive, effective, and innovation-driven European Research

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Area. The services we offer are the starting point; the insights we gather from them will help shape smarter, more targeted support for research and innovation in the future.

2. General procedures

2.1 Open call management

A unique Open Call for applications will be launched as a key mechanism to ensure that eligible beneficiaries have a structured access to the individualized services offered by the Facility. Through this process, organisations requiring targeted support will be able to submit their applications via a dedicated online form available on the project platform.

The Open Call will officially be launched on the project platform on 28/05/2025 and will remain open until 30/06/2028, ensuring ongoing access to the Facility's resources. Rather than operating with multiple open calls with different deadlines, we considered the use of a unique Open Call with multiple cut-off dates. At each cut-off date all applications received within the target period will be collected and assessed. Such an approach allows to better organise and allocate resources for the service delivery. Initially, up to twelve cut-off dates (every 3 months) are scheduled to facilitate a structured and ongoing evaluation process. Such intervals are supposed to be large enough to collect a critical mass of applications at each cut-off date, while keeping the time between the submission of an application and its assessment low enough (maximum 3 months). The Open Call process is designed to remain adaptive, with the Facility maintaining the flexibility to adjust the number and frequency of cut-off dates based on the volume of applications and available resources.

The call will be continuously promoted by the consortium partners in all eligible Countries and Regions.

Preliminary list CUT-OFF DATES (each date will be confirmed progressively by the Call Committee during dedicated meetings):

- 31st of July 2025
- 31st of October 2025
- 31st of January 2026
- 30th of April 2026
- 31st of July 2026

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- 31st of October 2026
- 31st of January 2027
- 30th of April 2027
- 31st of July 2027
- 31st of October 2027
- 31st of January 2028
- 30th of April 2028

2.1.1 Application process and form

Research Teams (RTs) and Research Management & Administration (RMAs) seeking individualised services are required to submit an application through a dedicated online application form available on the project platform as part of the Open Call process.

The application form has been designed to ensure a straightforward, accessible, and efficient submission process for all applicants:

- **Online procedure**: the form can only be accessed and submitted through an online platform, ensuring a streamlined and paperless process.
- **Minimal information requirement**: only the essential data necessary for the initial evaluation will be collected, reducing the burden on applicants.
- **User-friendly design**: the form is structured to be intuitive and easy to navigate, facilitating a smooth application experience.

The form is composed of three main sections.

The first section collects **general information** about the applicant organisation and the person submitting the application.

The second section gathers information about the **Key Exploitable Results[1](KERs)** the applicant intends to support through the Facility. Besides a brief description of the KER, applicants have to provide details of the RT responsible for the KER as well as the link to an ongoing or closed

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[1] KERs refer to significant research outputs, innovations, or advancements stemming from Widening actions under Horizon 2020 and Horizon Europe. These results must have potential for practical application and exploitation. These results must have potential for practical application and exploitation.

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Widening action. Such a link can be direct or indirect, i.e. indicating whether the KER was generated within the project or as a follow-up action, or in the same research domain.

The third section gathers information about **RMAs**. The applicant provides contacts of the person which will be required to provide further details on RMAs to be supported at a later stage.

The language selected for the submission of applications is English.

The use of the online platform allows automatic savings of draft applications, so that applicants can finalise their submission at any time. However, draft applications will not be considered unless they are formally submitted by clicking the ‘submit’ button.

2.1.2 General rules

Beneficiaries of the Facility have to meet specific eligibility criteria and selection criteria to successfully participate to the Open Call.

As general eligibility criteria:

- only organisations registered as legal entity can submit an application,
- such organisations have to be based in one of the Widening Countries,[2]
- applicants have to demonstrate a direct or indirect link to a Horizon 2020 or Horizon Europe Widening action, including Teaming for Excellence (Phase II), Excellence Hubs, Twinning, ERA Chairs, Widening/ERA Fellowships, ERA Talents, and COST Innovation Actions.

Besides eligibility criteria, selection criteria allow to adjust targets of the Facility, by setting specific priorities for the selection of applicants and secure wider impact. Such priorities may change at each cut-off date, upon discussion and agreement of the Call Committee. Modification of the priorities may occur for several reasons:

- balancing geographical presence of beneficiaries allowing good representativeness from the different Widening Countries
- focusing on KERs stemming from specific typologies of Widening Actions

[2] EU Member States: Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland, Portugal, Romania, Slovakia, Slovenia. Outermost regions: Açores, Canarias, Guadeloupe, Guyane, La Réunion, Madeira, Mayotte, Martinique, Saint-Martin. Associated Countries: Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, Georgia, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, Tunisia, Turkey, Ukraine.

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- better alignment with evolving needs and opportunities.

For the applications received within the **cut-off date of 31/07/2025**, the following priorities/conditions apply:

1. Applications providing the highest number of KERs will be prioritized.
2. Applications providing the highest number of KERs within the following Horizon Europe thematic domains will be prioritised:
    - 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
3. Applications providing the highest number of mature KERs will be prioritized. The maturity of the KERs will be assessed by the experienced evaluators based on the information provided in the **Exploitation Intentions Table** which will be filled in after eligibility check (see What happens after the submission section in the Call text).
4. Applicants whose involvement allow optimal use of resources of the widerAdvance Facility are prioritized (e.g. for completion of seats available in an edition of the D&E Academy).

Besides the above-mentioned priorities, selection of applicants will comply with the following additional criteria:

- At each cut-off date, the share of selected applicants from any one country or region should not exceed its proportional share of all Widening beneficiaries under Horizon 2020 and Horizon Europe, as established in the official programme statistics.
- Only one application from the same organisation will be selected at each cut-off date. If an organisation has been selected and it submits another application in a different cut-off date, that organisation will receive the lowest priority.

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2.2 The online platform

The widerAdvance Facility platform is structured to effectively manage the Open Call as well as to provide users with seamless access to key resources, updates, and opportunities.

The platform includes a comprehensive menu that allows visitors to navigate through essential sections such as services, events, news, information about the project, application procedures, success stories, and additional dissemination and exploitation tools. This intuitive layout ensures that beneficiaries can easily locate relevant content and engage with the available resources.

In addition to the public portal, a dedicated Intranet platform is used by the beneficiaries and experts of the Facility, to facilitate interactions, document sharing, scheduling of activities, etc. This restricted-access platform provides dedicated workspaces for registered users, ensuring a structured and efficient environment for interaction. The Intranet also facilitates real-time updates, allowing beneficiaries to stay informed about the latest developments, while ensuring ease of use through an intuitive interface.

2.3 The assessment of applications and the role of the Key Account Manager (KAM)

All received applications will be assessed by a Key Account Manager (KAM), who plays a central role in supporting applicants throughout the different services of the Facility, securing that they receive tailored guidance and services aligned with their needs.

More in particular the KAM will have the main responsibility of:

- checking the consistency of KERs proposed by a RTs,
- quickly assess the maturity level of the KERs (intended as its Use/Adoption Readiness Level),
- preparing the Service Delivery Plan for each applicant, specifying services for each RT and RMA,
- checks improvements made by RTs and RMAs to allow access to other services.

Their profile should include:

- excellent understanding of the definition of a KER and of the Use/Adoption readiness level,
- previous experiences in assessing Use/Adoption readiness level,
- previous experiences in supporting exploitation/dissemination of research results.

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The assessment made by KAMs begins at each cut-off date. After a quick check of the applicants' eligibility, the KAM sends a standard assessment tool (e.g. the Exploitation Intentions Table) via email and agrees with eligible applicants on a date for the Initial Engagement Meeting.

The Exploitation Intentions Table (a template of such tool will be available on the widerAdvance Platform) must be completed for each Key Exploitable Result (KER) listed in the application form and has the main objective of collecting information to decide about the final list of KERs to be supported within the Facility. Moreover, it allows to have an initial idea of the maturity of KERs and potential services to be activated.

Applicants are given ten days to fill in the table and return it via email.

Once the completed Exploitation Intentions Table is received, the KAM undertakes an initial assessment over the following four days to evaluate the relevance and potential of the submitted KERs.

This evaluation is followed by the Initial Engagement Meeting, which is conducted online and individually with each applicant. During this meeting, the KAM works directly with applicants to review each proposed KER and prepare a first version of the Service Delivery Plan, including the final list of RTs and RMAs to be supported with the individual services, training webinars, study visits, and coaching for synergies.

The KERs which match particular criteria (Access procedures" for each individual service in Chapter 3) will be considered as potentially ready to access directly a specific typology of service (e.g. intangible assets, standardisation, matchmaking preparation for third-party). They will be deeper assessed through a more specific Self-Assessment Questionnaire sent via email and returned within 10 days. In all these cases it is strongly recommended to involve the RTs directly involved in the exploitation and dissemination of the concerned KERs.

After this deeper assessment, the Service Delivery Plan for each applicant is finalized with the complete list of services to be activated.

The Service Delivery Plan (SDP) outlines the RTs and RMAs chosen for support, details the proposed services tailored to each team, and provides a structured schedule for their implementation. Commitment of RTs and RMAs will be also considered a key factor in the selection process, as active engagement is essential for the successful implementation of services. Some RMAs might be recommended to participate in activities focusing on RTs as a learning experience to familiarise with methodologies, tools, and practices in dissemination and exploitation.

Due to potential limitations in terms of resources and to ensure more effective organisation of activities, in case of a high number of applications received at specific cut-off dates, an upper limit may be applied to the number of beneficiaries selected. Such an upper limit and selection priorities are always outlined in the *Operational Manual of Tools and Procedures*, which is periodically updated. When assessing applicants, after the Initial Engagement Meeting, KAMs have to consider also these additional priorities and limitations. Discarded applicants might be considered at the next cut off.

The maximum number of applicants selected at each cut-off date will be set according to the resources available for delivery during that period. As a general rule, such a number should be sufficient to start up to 5 editions of the D&E Academy.

Selected applicants will be required to provide their approval (or rejection) of to the proposed SDP one week after the related services are proposed (at the Initial Engagement Meeting or at the deeper assessment meetings, if needed).

After the official approval of the SDP, the KAM formally appoints the experts responsible for delivering services. Such experts are selected based on the following criteria:

- previous experiences in delivering similar services (e.g. experiences within the Horizon Results Booster, AAL2Business, IP Booster, Standardisation Booster, Invest Horizon, etc.)
- direct knowledge of and/or operational experience in the Widening Countries of the target beneficiaries,
- experience in target domains of the supported KERs, such as Health, Social Sciences and Humanities, Culture, Security, Digitalisation, Industry, Space, Climate, Natural Resources, Environment, and Energy,
- availability during the period of execution of the services,
- geographical proximity to the beneficiaries (for the services which require physical meetings).

All appointed experts are required to sign a non-disclosure agreement before engaging in service delivery.

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Appointed experts are provided with all relevant information gathered during the assessment phase. This ensures a seamless transition into the service delivery stage, during which experts establish direct contact with participants via email to outline the schedule of activities.

At the end of each service, KAMs evaluate the progresses and improvements made by RTs and RMAs by analysing specific reports and feedback provided by the appointed experts. Based on such evaluation, KAMs may propose RTs and RMAs to access further services of the Facility.

3. Individual Services

3.1 D&E Academy

3.1.1 Scope

The **D&E Academy** is a structured service aimed at enhancing the impact of research results, by equipping RTs and RMAs with tools and methodologies to validate their concepts with early adopters. The Academy helps RTs to move beyond the lab environment to identify market needs, validate assumptions, and refine their innovations for better alignment with stakeholders, investors, and partners. The D&E Academy is designed to enhance D&E planning and support the development of comprehensive exploitation roadmaps, ensuring that the use model and unique value proposition (UVP) of each KER is validated with early adopters.

Key objectives of the D&E Academy are:

- Improve maturity of KERs.
- Strengthen D&E capacities.
- Improve skills for RTs and RMAs.
- Improve use/sustainability plans of KERs.

The operational framework of the Academy is built upon a demand-oriented approach, incorporating the principles of the lean start-up methodology.

The approach builds on previous expertise gained from partners in similar international initiatives such as the Horizon Results Booster and the AAL2Business services, integrating best practices and lessons learned to create a robust and adaptable methodology.

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The Academy will serve also as a structured learning environment where participants can enhance their knowledge and skills in dissemination and exploitation before progressing to more advanced services of the Facility. Through this structured progression pathway, the Facility ensures that beneficiaries receive the most appropriate level of support while maintaining flexibility for advancement based on demonstrated readiness.

During the Facility is expected to implement **50 editions** of the Academy.

3.1.2 Access procedures

The D&E Academy is designed for research teams (RTs) and research management/administration (RMA) who own less-mature KERs, given their need for structured support in dissemination and exploitation.

Each Academy edition will accommodate a maximum of **15 RTs, of which each is represented by one (1) KER for a total of 15 KERs per Academy**. RMAs are given the opportunity to participate in the programme as part of a learning experience. Their involvement allows them to gain practical insights into dissemination and exploitation processes, enhancing their capacity to support future initiatives within their organisation. The structured participation of RMAs contributes to building institutional knowledge and strengthening the broader ecosystem of research and innovation management.

The main criteria to be considered by KAMs to propose participation to the Academy to applicants are:

- Effective identification of a KERs;
- Identification and commitment of RTs responsible for the different KERs;

Due to the upper limit of participants in a single edition of the Academy (15 KERs supported as a maximum), KAMs may have also to select among KERs proposed in the application form. In this case, priority will be given to the KERs that are considered as more mature (in addition to the previous criteria).

Access to a single edition of an Academy can be granted also to 2 or more different applicants (organisations), however the upper limit of RTs remains the same.

If more than one (1) applicant provides participants to a single edition of the Academy, it is important to consider geographical proximity of applicants as one of the priorities for the selection.

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This allows higher optimization of resources, due to organisational aspects and logistics related to the implementation of in-person workshops foreseen in the Academy.

It is expected to provide access to the Academy to **100+ eligible organisations** and up to **750 RTs** (which each is represented by 1 KER) over the whole Facility implementation.

Participation in the D&E Academy provides beneficiaries with the opportunity to progress towards more advanced services, based on the demonstrated maturity of their KERs during the Academy sessions. If a KER reaches the necessary level of maturity while attending the Academy, access to the corresponding advanced services will be granted. Nevertheless, access to the preparation for matchmaking with third parties is conditional upon the successful completion of the D&E Academy.

3.1.3 Workflow procedures

General approach and methodology

The D&E Academy consists of three interconnected workshops, complemented by individual coaching sessions, to provide participants with essential tools and peer-learning opportunities (Fig.1 The scheme of the D&E Academy).

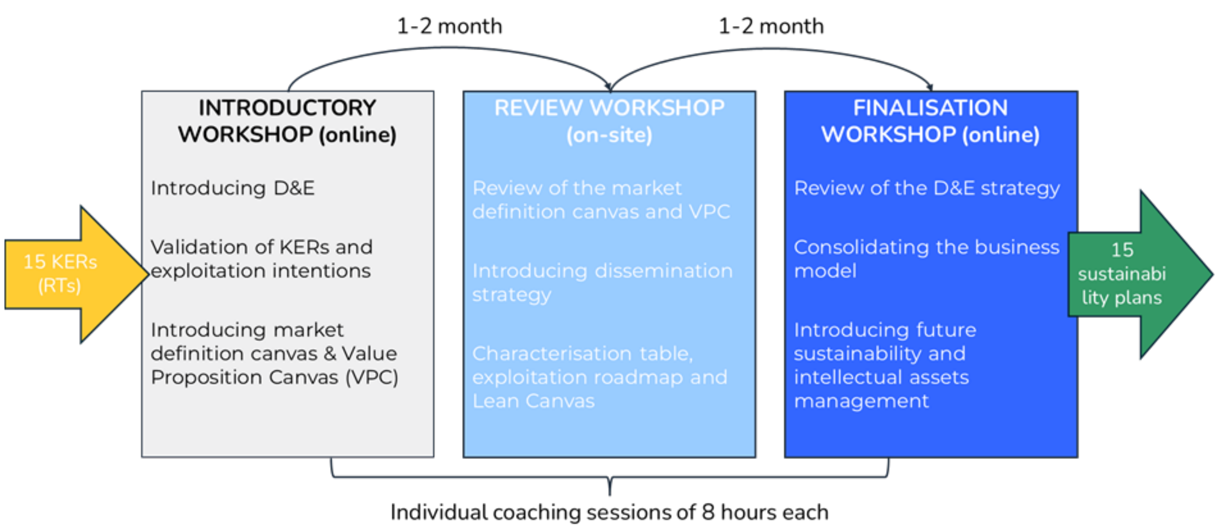

Fig.1: The scheme of the D&E Academy

The organisational structure of the Academy is designed to ensure the effective delivery of services while optimising resources and fostering a demand-driven approach. The allocation of resources within the Facility follows an optimisation strategy that takes into account geographical considerations. This approach ensures that resources are used efficiently and distributed in a way that maximises impact while maintaining accessibility for all participants. By strategically managing resource allocation, the Facility can sustain a balanced and equitable distribution of support, promoting greater engagement across different regions.

The Lean Startup methodology serves as the primary framework applied within the academies, fostering a market-oriented approach through hypothesis-driven experimentation, iterative development, and early engagement with adopters. This methodology ensures that D&E strategies are structured around real-world needs, increasing the likelihood of successful innovation uptake.

Resources needed

The delivery of the D&E Academy requires at least the following staff:

- 1 senior expert specialised in exploitation issues,
- 1 senior expert specialised in dissemination issues,
- 1 junior expert to support senior expert(s).

In some cases, a single expert can be specialised in both exploitation and dissemination issues. Please note that additional junior experts might be needed during workshops to manage parallel breaking rooms.

When appointing experts for the delivery of the D&E Academy, the KAM should pay particular attention in considering previous experiences with supporting business development, market validation, and dissemination strategies.

The following main tools are used during the delivery of the D&E Academy. The tools are available on the Platform for the Expert and the selected beneficiaries:

- **The Market Definition Canvas:** is a strategic tool designed to help teams clearly define the market for their innovation. It guides the identification of target users, customer segments, unmet needs, and market dynamics. By offering a structured overview of the market landscape, it supports informed decision-making, sharper value propositions, and more effective exploitation strategies.
- **The Value Proposition Canvas (VPC):** it is fundamental in ensuring that KER owners develop solutions that are aligned with actual market needs. It helps prevent common

innovation pitfalls, such as advancing a technology without a clearly defined use case or target audience. The VPC is structured around two core elements: the Customer Profile, which highlights the context and motivations behind an adopter's decision-making process, and the Value Map, which articulates the value a product or service delivers. By establishing a strong fit between these two elements, the tool ensures that innovations align with market expectations, ultimately increasing their potential for adoption and long-term sustainability.

- **The Characterisation Table:** is a practical tool that helps define and analyse a KER in a structured way to strengthen pathway from research to real-world impact. It guides beneficiaries in identifying the problem being addressed, the potential users, and how the result stands out from existing solutions. By clarifying the Unique Value Proposition and target market, the table supports the development of a clear exploitation strategy. It also encourages reflection on competitors, early adopters, and the most suitable model for bringing the result to market. Additionally, it ensures that intellectual property considerations, both background and foreground, are properly addressed.
- **The Exploitation Roadmap:** serves as a strategic planning tool aimed at supporting RTs in outlining and organising key activities to be undertaken following the conclusion of the academy. Its primary function is to provide a structured approach to ensuring continuity and progress beyond the project's formal end. A common and significant risk encountered at this stage involves the inability to effectively implement the exploitation and dissemination strategies that have been developed. This can hinder the advancement of the TRL or delay potential market entry, often due to limited resources or insufficient planning. By offering a clear framework, the Exploitation Roadmap is intended to anticipate and address such challenges. It facilitates the identification of critical steps, resource needs, and timelines, thereby helping to mitigate potential obstacles. The roadmap contributes to increasing the likelihood of practical application, scalability, and broader impact of the project outcomes.
- **The Lean Canvas:** it functions as a dynamic progress-tracking tool, enabling research teams to systematically outline their strategic roadmap. It facilitates structured coaching sessions and acts as a scorecard, allowing beneficiaries to visualise their progress while continuously adapting their approach. A key component of this tool is the Value Proposition, which plays a crucial role in shaping a clear and compelling offering for potential adopters.
- **Dissemination Strategy template:** is a strategic tool to guide RTs in the definition of their dissemination strategy by providing steps to follow and questions that support critical thinking and facilitate the definition of the plan. The template is divided into different sections that provide a methodological approach to the dissemination phase.

Experts are also provided with the templates of the presentations (ppt) to be used during the workshops (the presentations are uploaded on the Platform as well). In particular:

- ppt1 is used during the first workshop,
- ppt2 is used during the second workshop,
- ppt3 is used during the third workshop.

One of the workshops of the D&E Academy is organised as **an on-site, in-person event**. This requires the availability of suitable logistic resources (venue) for the organisation of such workshop. The venue should allow:

- the participation of up to 40-50 people. Each edition of the Academy involves up to 15 different RTs and RMAs and team is expected to be composed on average by 2-3 people.
- the use of technological equipment for the effective delivery of interactive sessions (microphones, video projector and screen or large display for presentation, reliable Wi-Fi connection, etc.).
- easy access to participants. To encourage active presence of participants from different organisations, the selection of the location should consider minimization of travel costs for participants.

For the purposes of the widerAdvance Facility, each edition of the D&E Academy will be organised taking into account the optimization of the number of RTs/ RMAs coming from different organisations. Ideally, an edition of the D&E Academy is dedicated to a single beneficiary (organisation) or to beneficiaries coming from the same country/ geographical area. This allows minimisation of travel costs. Moreover, since most of the potential beneficiaries are RTOs, they are supposed to have venues matching the described parameters and will be required to make them available free-of-charge to host the on-site workshop.

The online workshops of the D&E Academy should be organised in a way to ensure a smooth and engaging virtual experience for all participants. They are foreseen at the beginning of the service and at the end (Fig.1 The scheme of the D&E Academy). This requires the use of a reliable video conferencing platform allowing:

- Real-time interaction between facilitators and participants;
- Creation of multiple breakout rooms for group activities or parallel discussions;
- The ability to bring all participants back into a main virtual room for plenary sessions;
- Screen sharing, whiteboard functions and file sharing for interactive presentations;
- Host/experts controls to manage participants, mute/unmute, or assist with troubleshooting.

Applications such as Microsoft Teams or Zoom are recommended, as they match all such requirements.

For the proper delivery of online workshops, experts need the following technical setup:

- A dedicated host account with full control over the session (not a free/basic plan);
- A stable internet connection;
- Use of headsets/microphones to ensure clear audio;
- A reliable webcam with clear image quality.

It is important to note that in case of use of parallel breakout rooms, each of them should be coordinated by an expert (junior or senior). Therefore, the number of experts appointed for the D&E Academy should be planned accordingly.

The delivery of the D&E Academy is based on the interaction between experts and beneficiaries, which goes beyond the online/onsite workshops and coaching sessions. It is important to make available a **dedicated online workspace** as a central hub for managing resources, exchanging information, and supporting the organisation of both online and on-site sessions. Within the context of the Academy, such online workspaces will be made available on the widerAdvance Facility's platform.

Delivering procedures

The experts, after their official appointment, check all documents (application, exploitation intentions table, service delivery plan), which are made available for each specific assignment on the widerAdvance Facility platform.

Within one week from the appointment, experts send an e-mail to the contact persons of each RT/ RMA that will be involved in the Academy. The email provides an initial outline of the schedule of activities and propose a date for the first introductory workshop.

Prior to the Introductory workshop, experts review the Exploitation Intentions Table provided by each RT/ RMA and prepare the slides to be presented (using the available template).

The **Introductory Workshop** takes place online within one month from the expert appointment. It has the main objective of introducing participants to key concepts related to the exploitation and dissemination of research results. Participants better understand how to transition from Key Exploitable Results (KER) to real-world impact through strategic planning and market positioning.

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A tentative agenda for the Introductory Workshop is the following:

1st Introductory Workshop Agenda – Online	
30’	Ice Breaking and introduction to the programme
60’	From KER to impact: exploitation & dissemination
20’	Coffee break
60’	Review and validation of KERs and exploitation intentions (breaking rooms)
20’	Coffee break
30’	Introduction of the Market Definition Canvas & VPC
30’	Q&A
15’	Wrap up & End of meeting

The approach should be adaptable to the participants' level of knowledge and engagement, and the expert should focus on facilitating rather than lecturing.

The session begins with an ice-breaking activity and an introduction to the programme. At this stage, the expert should establish a welcoming and open atmosphere, encouraging participants to introduce themselves and share their expectations. It is essential to set the context for the workshop, outlining the objectives and explaining how each session contributes to the overall impact of the programme.

Following the introduction, the workshop explores the transition from Key Exploitable Results (KERs) to impact, focusing on exploitation and dissemination strategies. The experts should clearly define KERs, their significance in research and innovation projects, and the mechanisms available for effective dissemination and exploitation. Real-life examples and interactive discussions should be integrated to illustrate how these principles are applied in practice. A focus will be given on why dissemination is essential in maximising impact of the research results.

The next session focuses on the review and validation of KERs, and exploitation intentions proposed by the RTs within breakout rooms. The experts should facilitate structured discussions in smaller groups, ensuring each participant has the opportunity to present their KERs and receive constructive feedback. This segment should be interactive, encouraging peer learning and critical analysis of different exploitation pathways. If possible, the experts should form homogeneous groups, considering different aspects such as, typology of KERs, typology of use/exploitation model, specific domain, etc.

At the end of the workshop experts introduce the tools to be used next: the Market Definition Canvas and Value Proposition Canvas (VPC). Participants are asked to fill in such tools and send them back at least one (1) week before the Review Workshop. Experts start also exploring together with RTs potential dates for the on-site Review Workshop to ensure their availability.

The templates of the Market Definition Canvas and Value Proposition Canvas (VPC) will be made available on the online platform.

After the Introduction workshop, individual online coaching sessions are made available to each RT/ RMA to support them in the preparation of the two (2) tools. Each RT/ RMA can request an up to eight (8) hours of individual coaching sessions, distributed along the whole duration of the Academy. Experts keep track of the coaching hours "consumed" by each RT/ RMA on the online platform.

The Review Workshop is organised as an on-site event up to two (2) months after the Introductory Workshop. The main objective is to clearly identify potential "markets" and competitive advantages for the supported KERs as well as the consistent dissemination strategies.

As a result, participants have a deep understanding of:

- who are the users and adopters (the "markets") of their KERs;
- why such users and adopters should prefer the proposed KERs instead of alternative solutions;
- how such users and adopters could be reached out through effective dissemination channels and how to characterise messages.

The location for the Review Workshop should be agreed and confirmed at least four (4) weeks before the workshop, to allow participants a better organisation.

Two (2) weeks before the Review Workshop experts send to the RTs a reminder about the place, date and time of the workshop and receive back the filled in Market Definition Canvas & VPC.

As a preparation of the Review Workshop, experts finalize the slides to be used (using the available template on the online platform) and provide comments and suggestions to the received Market Definition Canvas & VPC, to be further discussed during the workshop.

A tentative agenda for the Review Workshop is the following (it suggested to split it in two (2) half-days, but can be delivered also in a single day):

2nd Review Workshop Agenda – On-Site	
Day 1	
30’	Face-to-face presentation and introduction of the day
90’	Identification of the “market”: review of the Market Definition Canvas (according to the exploitation intentions)
20’	Coffee break
90’	Identification of the competitive advantage: review of the VPC (according to the exploitation intentions)
15’	Wrap up & end of the day
Day 2	
15’	Introducing the day
30’	Introducing dissemination strategy
60’	Tools and methodologies for implementing dissemination
20’	Coffee break
60’	Designing your exploitation strategy: characterisation table, exploitation roadmap and Lean Canvas

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30’	Q&A
15’	Wrap up & End of meeting

The workshop begins with a face-to-face introduction, setting the stage for the discussions ahead. The initial phase of the workshop focuses on reviewing and discussing each Market Definition Canvas to clearly identify market segmentation, customer needs, and strategic positioning. The experts should guide participants in refining their understanding of who are the users and the adopters of their KERs (the target “market”), challenging assumptions where necessary and prompting them to consider alternative approaches.

Then the discussion shifts to the identification of competitive advantage and the Unique Value Proposition of KERs through a review of the VPC. This enables participants to clearly articulate how and by how much each KER solves users and adopters needs better than current alternative solutions.

The next session of the workshop focuses on the construction of dissemination strategies based on the template Dissemination Strategy template, analysing the different dissemination channels, target audiences, and key messaging approaches. Participants are provided with information on how to build a dissemination strategy and encouraged to critically evaluate it to ensure the coherence with their exploitation intentions. Tools and methodologies for implementing dissemination are also presented.

The final part of the workshop focuses on the introduction of key tools to design and/or review exploitation and dissemination strategies of each RT/ RMA. In particular, experts introduce the Characterisation Table, Exploitation Roadmap, the Lean Canvas and the Dissemination Strategy template, asking participants to fill them in before the next Finalisation Workshop. Before leaving, experts explore with participants potential dates for the Finalisation Workshop.

After the Review Workshop, each RT/ RMA can request to have individual coaching sessions with the experts to receive tailored support for the preparation of the Characterisation Table, Exploitation Roadmap, and the Lean Canvas.

The Finalisation Workshop is organised online up to two (2) months after the Review Workshop and has the main objective of refining and consolidating the exploitation and dissemination (D&E) strategies of each RT/ RMA by finalising their use/business models, selecting the appropriate dissemination channels and products, securing sustainability and considering intellectual assets management (if relevant).

Two (2) weeks before the Finalisation Workshop, experts should confirm the date and send the invitations to the participants as well as a reminder to the RTs/ RMAs to send back their Characterisation Table, Exploitation Roadmap and Lean Canvas.

Once RTs/ RMAs send back the filled in tools, experts provide comments and suggestions as discussion points to be addressed during the workshop and prepare the slides to be presented (using the template available on the online platform).

A tentative agenda for the Finalisation Workshop is the following:

3rd Finalisation Workshop Agenda – Online	
15’	Introducing the day
60’	Review of the D&E strategy (dedicated breaking rooms using the Lean Canvas)
30’	Feedback and open discussion with participants
20’	Coffee break
60’	Consolidating the use/business model: The Lean Canvas
30’	Introducing future sustainability ensuring cost coverage
30’	Introducing intellectual assets management
15’	Wrap up & End of meeting

The first part of the workshop focuses on reviewing and discussing collectively the D&E strategies for each KER, working in dedicated breakout rooms. Like in the Introductory Workshop, groups can be formed based on commonalities of the different RTs/ RMAs.

Following this, a plenary open discussion session provides participants with the opportunity to share insights and receive further inputs from peers. Experts should foster an open exchange of

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ideas, allowing participants to critically assess their own strategies while benefiting from different perspectives.

The next part of the workshop focuses on the consolidation of each use/business model through the use of the Lean Canvas. In addition, further elements of the D&E strategies are addressed through the consolidation of the Dissemination Strategy template, such as costs and revenue streams allowing future sustainability of KERs and intellectual assets management.

In case during the discussion experts realise that intellectual assets management or standardisation are critical factors for the successful exploitation of the KERs, they may suggest the participation of the concerned RTs/ RMAs to the other individual services of the Facility. In particular, experts have to contact the KAM and provide justification for the activation of the additional services.

After to the Finalisation Workshop, each RT/ RMAs can request to have individual coaching sessions with the experts to receive tailored support for the finalisation of their D&E strategies. They will have time up to 3 weeks after the Finalisation Workshop to request individual coaching.

Participants are then asked to upload on the online platform their final versions of the Lean Canvas, the Characterisation Table and the Exploitation Roadmap, based on the suggestions received.

At the end of the Academy the experts have to prepare a final report including:

- the main achievements and progresses made by participants,
- the level of maturity reached by each KERs,
- specific recommendations to participants on next steps.

The recommendations in the final report should also specify if additional services from the Facility are suggested to the different RTs. In particular, recommendations have to be provided about the readiness for the *Preparation to Match with Third Parties* service.

3.2 Support with intangible assets

3.2.1 Scope

Support with Intangible Assets provides organizations with tailored services to help them protect and manage their intellectual property (IP) assets and commercialize their KERs. Recognizing the iterative processes of innovation and incremental scaling of TRLs, the service offers two packages to beneficiaries – (i) IP Strategy and Path to Commercialization and (ii) IP Negotiations.

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The scope of each package will be adjusted to the real needs of beneficiaries as identified by themselves, the KAM, and the service delivery IP experts. Decisions to potentially amend the scope of the service provided will likely occur on a case-by-case basis and will be reflected in the service framework (also referred to herein as the Service Delivery Plan).

3.2.2 Access procedures

Support with Intangible Assets is designed to support RTs and TTOs (or their equivalent) with Key Exploitable Results (KERs) at higher maturity levels. Each service will accommodate a maximum of **3 KERs** coming from the same beneficiary organization.

The nature and the specificity of this service requires access criteria to ensure efficient and effective delivery. Before entering the service, beneficiaries should demonstrate:

- Existence of KERs that can be protected;
- TRL of the supported KER at minimum level 4;
- Existence of a real market for the KER.

Such criteria are verified by the Key Account Manager (KAM) through the Exploitation Intentions Table and during the Initial Engagement Meeting. In case such criteria are matched, KERs will be deeper assessed through a more specific Self-Assessment Questionnaire (also declaring the IP ownership structure) sent via email and returned within 10 days. An in-depth interview is then organized with the involvement of the RTs/RMAs responsible for the KERs and the experts that would be responsible for the delivery of the service.

After the in-depth interview, the KAM and relevant IP expert recommend a tailored pathway for one of the service packages:

- **IP Strategy and Path to Commercialization** for early-stage IP assessment, market analysis, and IP valuation;
- **IP Negotiations** for beneficiaries actively preparing for commercialization or investment.

Beneficiaries of the D&E Academy may be funneled to the IP services as well at a later stage during their participation in the Academy. In order to access the IP service, they will need a recommendation from one of the experts involved in the delivery of the Academy.

A confidentiality agreement (NDA) will be signed by the IP expert at the application review stage, before engaging in deliberations about the project's merit and before a service package is prepared.

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3.2.3 Workflow procedures

General approach and methodology

This service includes 2 main typologies of support that can be delivered alternatively to each individual Key Exploitable Results (KERs).

IP Strategy and Path to Commercialization

This service **assesses patentability (novelty search), pinpoints pivotal prior art, and provides strategic counsel on IP protection** for selected KERs (as summarized in Table 1). Leveraging IP search tools and databases like Patsnap, Espacenet, and PatentScope and using International Patent Classification (IPC) / Cooperative Patent Classification (CPC), the analysis is supplemented with searches on academic platforms (such as Google Scholar) and business platforms to gain a thorough insight. Understanding the necessity of accurately valuing intellectual properties, an IP valuation will be offered to the team representing each KER as part of this service.

The methodology begins by guiding beneficiaries through data gathering about the existing intellectual property and then conducting an initial market and Freedom to Operate (FTO) analysis pursuant to the IP. This approach does not just evaluate the current state of the IP; it scouts IP of the competitors and identifies potential customer typologies for the KER, setting the stage for possible commercial engagements. A blend of valuation methodologies, primarily revenue based, will be used to arrive at an objective market value for the KER. It will also focus on clarification of the ownership structure of the IP.

The most relevant patent and non-patent prior art results will be documented in a novelty report which will be created from a template. The most pertinent extracts from the relevant patents will be highlighted. Commentary will accompany the findings, explaining which features have been disclosed in prior art and which elements (if applicable) may have novelty and are therefore worth focusing on in the patent drafting stage. The culmination of this process is **the formulation of an IP Strategy, with indications as to which protection and commercialization model might make the most sense**, emphasizing both the protection and optimal exploitation of the KER.

In relevant cases, a trademark and/or design search would be conducted. A short report will summarize registered territories and classes (if applicable), with commentary on registration eligibility for the mark/design. If relevant, any designs will be assessed, and a recommendation will be given on the commercial value of design registration.

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Table 1 Summary of Services: IP Strategy and Path to Commercialization

Beneficiaries	Research organizations (Research team, Research managers, TTOs) with up to 3 KERs each
Duration	Six (6) weeks
Achievements	• Information about the existing IP and value of the competitors' IP (i.e., novelty report, competitor's IP landscape) • Information about the KER's IP value • Recommendations for type of the IP protection incl. geographic coverage based on the results of the FTO analysis and business plans • Valuation and strategy recommendations - IP protection strategy aligned with the business strategy
Output	IP Strategy Report
Method(s)	• Patent, design, utility model and trademark search and IP landscaping – usage of Patsnap, Espacenet, PatentScope, Design search, etc. other platforms • Freedom to operate (FTO) analysis • IP valuation – primarily revenue-based methodology, other methods such as cost and market approach will be considered too
Outside scope of service	• Patent, design, utility model and trademark application filling • IP litigation

IP Negotiations

This service helps prepare beneficiaries to establish the right IP framework and/or valuation to prepare to negotiate with interested parties (as summarized in Table 2). Building an IP business case and supporting negotiations with prospective customers or partners will help secure the best deal for beneficiaries while also building capacities for further technology transfer within the receiving institution.

This service begins with a **comprehensive negotiation strategy design** in conjunction with research teams, and, where pertinent, technology transfer offices (TTO). The strategy serves as a precursor to the negotiation process. The design process will consist of iterative meetings with the IP experts to help understand the KER's needs and tailor a negotiation strategy to address them through tangible outputs and/or on-the-spot technical assistance.

Each interaction will have different outputs, based on the needs of the KER. It is intended **to create** an **industry-standard term sheet**, highlighting pivotal aspects like royalties, IP rights, and payments. Competition benchmarking, mock negotiations, and internal workshops with KER teams to align priorities may also be provided to help inform the KER teams negotiations. KERs will also be offered support in **drafting licensing or purchase agreements** and will receive

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guidance in establishing robust contract management systems. Facility involvement is flexible, ranging from active participation in discussions to behind-the-scenes advisement. The expert will coach the team prior to a negotiation and, if requested, be present at the negotiating table and debrief the team after a negotiating session and plan the next round. In the event of licensing activities, the licensing agreement will be reviewed and written comments and suggestions offered by the experts.

As part of the negotiation strategy, the experts will also help KERs to evaluate their IP and develop their BATNA (Best Alternative to a Negotiated Agreement). The beneficiaries will be able identify which aspects they are willing to negotiate and which not ('red-lines').

The IP Negotiations service will last six weeks. Experts will remain at the KER teams' disposal for up to thirty (30) days, after the six-week period, to help guide their preparations for investments.

In addition to this, up to five (5) KERs will be selected for **in-person assistance during face-to-face negotiation** meetings throughout the whole duration of the Facility. These five KERs will be determined by experts delivering IP service in collaboration with the KAM. These will award the in-person assistance to KERs that display outstanding commercial potential as evidenced by their exploitation table and/or results from services in the *IP Strategy and Path to Commercialization* package and that already have a concrete partner for negotiations.

Table 2 Summary of Services: IP Negotiations

Beneficiaries	Research organizations (Research team, Research managers, TTOs) with up to 3 KERs each
Duration	Six (6) weeks + thirty (30) days support
Achievements	• Commercialization of IP • Ready to approach investors • Ready to spin-out/spin-off
Output(s)	• Negotiation Strategy • Term Sheet for negotiations incl. BATNA • Competition benchmarking • Assistance during negotiations with institutions related to IP spin-off and investors related to spin-off investments (e.g., mock negotiations) • Commercialization documents, such as license agreements or purchase agreements
Method(s)	• Face-to-face and online consultations
Outside scope of service	• Pitching investors • Leading negotiations • Legal or financial services

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Resources needed

- The delivery of the Support with intangible assets services requires **2 experts** specialised in IP protection, IP management, IP valuation and business development/acceleration.

The following tools are used by the experts during the delivery of the Support with Intangible Assets service:

Framework documents

- IP self-assessment questionnaire – helps the KAM and IP experts understand the specific IP needs of the RT;
- Service Delivery Plan (SDP) – to be agreed upon with the RT;
- Templates for licence agreements, term sheets, etc;
- Final report template – for structured reporting at the end of the service.

IP Databases and Tools

These tools are essential for effective IP assessment and valuation:

- Patent databases and tools: PatSnap, Espacenet, PatentScope, IPscore
- Trademark databases: TMView, TMClass, eSearch, Global Brand Database
- Design databases: DesignView, Global Design Database
- Patent classification systems: International Patent Classification (IPC), Cooperative Patent Classification (CPC)
- Trademark and Design classification tools: TMClass, Vienna, Nice Classification, Locarno Classification
- Microsoft Office tools, especially Excel, are required for financial modelling and IP valuation (Discounted Cash Flow - DCF).
- Publications – academic papers or specific open-source platforms with financial parameters used for the IP valuation

Service Delivery Format

- The service will be delivered mostly online, except for five cases where on-site support will be provided for negotiations. Access to a commercial video conferencing platform is required..

Delivering procedures

The implementation of services will follow the process outlined in Table 3 and will consist of the milestones and activities outlined in the phased sections below.

Table 3 Overview of the process: IP Strategy and Path to Commercialization and IP Negotiations

1. A dedicated IP service delivery manager (main expert) is assigned to each beneficiary. 2. Sessions (online or in-person) are scheduled based on the agreed-upon timeline. 3. A kick-off meeting is held to clarify objectives and expectations. 4. A formal service framework called Service Delivery Plan is determined between the expert team and KER team after the kick-off meeting outlining the scope, duration, and deliverables. 5. The service is delivered by two experts within 6 weeks. Main expert will be supported by another IP expert in the delivery. 6. A closing report on each KER is delivered by the IP experts to beneficiary and KAM, summarizing all the outputs and activities conducted.

The service workflow is structured into defined stages to ensure smooth execution and measurable outcomes. These procedures are tentative and may vary based on the IP service, circumstances, and needs of each KER. Activities will depend on the negotiated Service Delivery Plan. Generally, online or in-person meetings will be held weekly, with more meetings/communication scheduled around output delivery dates.

The implementation process will resemble the following phases:

(i) Initiation Phase (Week 1)

- Conduct an introductory call to agree on goals and_expected outcomes, and clarify any preliminary questions.
- Collect and verify necessary documents from beneficiaries.
- Finalize the service framework (Service Delivery Plan), including key milestones and communicate it to all parties.

(ii) Analysis and Assessment Phase (Week 2-3)

- Conduct a detailed patent search and IP landscape analysis**.**
- Perform freedom to operate (FTO) analysis and preliminary IP valuation.
- Develop insights into market positioning and competitor IP landscapes.

- For IP Negotiations: collect information for term-sheet, identify negotiations strengths and bottlenecks, and conduct preliminary business validation activities.

(iii) Strategy Development Phase (Week 4-5)

- For IP Strategy and Commercialization Path: Draft and/or refine the IP protection strategy, aligning it with commercialization goals.
- For IP Negotiations: draft an industry-standard **term sheet** covering licensing, royalties, and IP ownership terms.

(iv) Implementation and Support Phase (Week 5-6)

- Deliver draft final reports to beneficiaries, depending on the service package (e.g., IP due diligence findings, valuation summaries, competitor segmentation, market analyses, etc.) and commercialization recommendations.
- For IP Negotiations: provide hands-on negotiations and mock-negotiations training with beneficiaries.
- Conduct a final debrief meeting with beneficiaries; discuss the draft report/documents.
- Provide guidance on next steps, including contract negotiation strategies.
- Send final report to the beneficiary.

(v) Follow-Up and Post-Service Support (30 days for IP Commercialization and Negotiations)

- Provide ongoing advisory support to beneficiaries preparing for investor or institution negotiations.
- Offer in-person assistance for selected cases during key negotiation meetings.
- Support the drafting and finalization of licensing or purchase agreements.
- IP experts, supported by KAM, will write a closing report summarizing all outputs, providing lessons learned and reflections, and collecting data on the concluded services.
- The team representing KER will fill out surveys on their experience and the program's performance.

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3.3 Support with standardisation

3.3.1 Scope

The support with standardisation service is a consultancy designed to facilitate and streamline the dialogue between Research Teams (RTs) and Research Management and administration (RMAs) with the Standardisation landscape and its main actors, namely corresponding Standards Developing Organisations (SDOs) to maximise the impact of research carried out in widening countries and outermost regions' on standardisation and strengthen European competitiveness. The support with standardisation offers 1:1 consultancies to RTs in organisations who have benefited from widening actions and training webinars for RMAs seeking guidance on standardisation-related aspects of their research projects. The aim of the service is to assist RTs and RMAs in:

1. Effectively navigating the standardisation landscape;
2. Ensuring their work aligns with relevant standards;
3. Maximising their impact in the market by planning activities to contribute to pre-normative standardisation.

By the end of the service, the research team will receive a summary report compiled by the expert with the description of the meetings, activities performed, and standardisation recommendations made. The report is available for the RTs/ RMAs on the widerAdvance Facility platform. A feedback survey will also have to be filled in on the platform by the RT/ RMAs at the service completion.

It is estimated that the Facility will deliver 15 editions of the support with standardisation service.

3.3.2 Access procedures

The standardisation 1:1 consultancy is designed for RTs and RMAs with an intermediate to advanced Technology Readiness Level (**TRL 4-9**).

Research teams with little to no knowledge about standards may be encouraged to participate in other services, such as training and awareness webinars on standardisation, where appropriate. However, for projects which require **tailored support** such as matching results to existing standards or understanding a domain-specific standards landscape, then the one-to-one service will be used.

Such needs are verified by the KAM through the Exploitation Intentions Table and during the Initial Engagement Meeting. In case such needs are matched, KERs will be deeper assessed

through a more specific Self-Assessment Questionnaire sent via email and returned within 10 days. An in-depth interview is then organized with the involvement of the RTs responsible for the KERs and the experts that would be responsible for the delivery of the service.
After the in-depth interview, the KAM and relevant standardization recommend a tailored pathway for the support with standardization.

3.3.3 Workflow procedures

General approach and methodology

The consultancy service is designed based on the consolidated experience of the [Horizon Standardisation Booster] to be "light" and efficient, with **an expert dedicating a maximum of 4 Effective Working Days (EWD) to the service**. This effort will be spread over a **maximum timeframe of 2 months** (as seen in figure 2). If required, longer durations can be agreed upon based on specific needs, however always considering an equivalent effort of 4 EWDs per service. After the expert has been matched with the Research Team, in **each service they will carry out up to 3 calls of approximately 1.5 hours, between the RT and the expert plus independent work**.

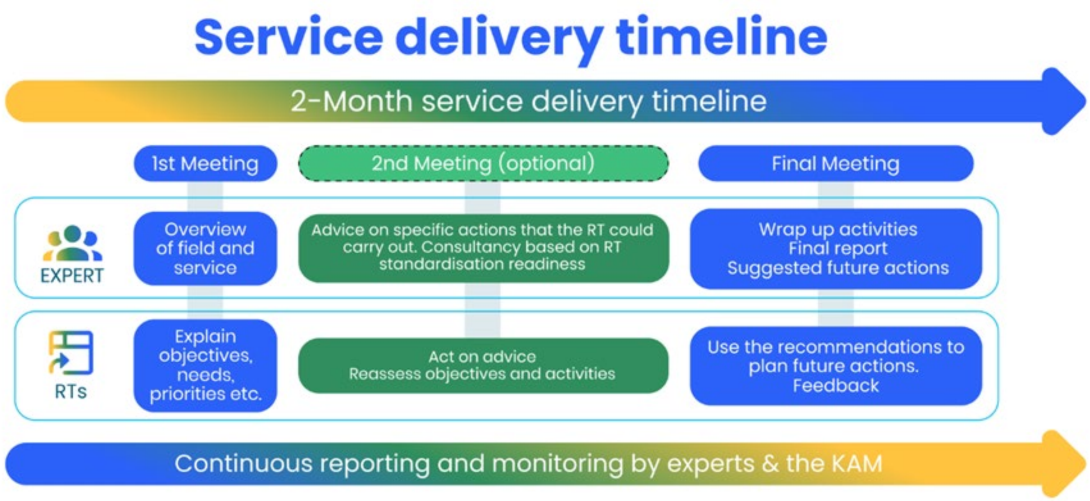

Fig 2. Support with standardisation – Service delivery timeline

Each service will accommodate one applicant organisation at a time, this means that more than one Research Team can participate in the service at the same time, assuming they have similar standardisation needs and the same area of interest in terms of standardisation.

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Topics covered by the Standardisation service are:

- Green transition in Europe:
    - Clean energy
    - Materials (raw and secondary)
    - Green and sustainable production
    - Environmental impact
- Health:
    - Pandemics
    - eHealth and personalised services
    - Design and use of medical devices
    - AI in healthcare
- Resilience:
    - Robust supply chains
    - Climate resilience
    - Hybrid/civil defence
    - Data protection and cybersecurity
- Smart cities and circular economy:
    - Circular economy
    - Transportation
    - Infrastructure
    - Green buildings
    - Nature based solutions
- Sustainable digitalisation:
    - Data quality
    - Artificial intelligence
    - Access to and use of data
    - Space
    - Data and cybersecurity
    - Quantum technology
    - 5G/6G Networks

Resources needed

1 Senior Standardisation Expert

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1 Standardisation Key Account manager (Trust-IT)

When appointing experts for the delivery of the support with standardisation service, the KAM should consider the information provided by beneficiaries during the application process, the TRL and KER maturity levels of the RT. Most importantly, experts will be selected based on their expertise in the thematic area most relevant for the selected KERs.

The following tools are used during the delivery of the support with standardisation service:

- **The standardisation self assessment questionnaire:** this questionnaire will help the KAM appoint an expert that can support the RT's specific standardisation needs and will be available to experts on the platform.
- **The summary report:** this will need to be filled out by the expert during the delivery of the service, to summarise all activities carried out, standards identified and recommendations given.

The delivery of the support with standardisation service will take place exclusively **online**.

This requires the use of a reliable video conferencing platform allowing:

- Real-time interaction between expert and beneficiaries
- Screen sharing, whiteboard functions and file sharing for interactive presentations if needed.
- Host/experts controls to manage participants, mute/unmute, or assist with troubleshooting

Applications such as Microsoft Teams or Zoom are recommended, as they match all such requirements.
For the proper delivery of the service, experts need the following technical setup:

- A dedicated host account with full control over the session (not a free/basic plan)
- A stable internet connection
- Use of headsets/microphones to ensure clear audio
- A reliable webcam with clear image quality

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Delivering procedures

Step 1 - Expert's first contact with the applicant

After receiving confirmation of their appointment, within one week the expert sends an e-mail to the assigned applicant and the RT/ RMA assigned to them to agree on the scheduling of the **Call 1** (remotely, through web conferencing tools such as Teams or Zoom), proposing a set of dates.

Step 2 – Detailed assessment of standardisation knowledge

The appointed expert starts the analysis of all standardisation material they received from the RT, including the additional materials and answers to the self-assessment questionnaire submitted in the application phase.

The Call 1 has an average duration of 0,5-1 hour and its overall objective is to introduce more details about the delivery of the standardisation service and to carry out an initial interview of the applicant to:

- **Validate general needs** of the research team based on the **Self-Assessment Questionnaire.**
- **Plan** upcoming calls and define the timeline for the service.
- Validate which **type of support** the RT would like to receive amongst the following:
    - Standardisation Mapping;
    - Suggestions on Standardisation Deliverables or Future Strategy;
    - Understanding Standardisation Processes;
    - Training Materials;
    - Engaging with Standardisation Development Organizations (SDOs) or Technical Committees/Working Groups (TCs/WGs);
    - Facilitating access to standards or TCs/WGs;
    - Preparing project deliverables for eventual submission to TCs a new work items (NWI)
    - Mapping RT KERs with standards and TCs;
    - Preparation for design of CWA (CEN Workshop Agreement);
    - The expert assigns tasks to the expert themselves and to the RT/ RMA to be completed before call 2.

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At the end of the Call 1 the expert and RT/ RMA agree on tasks to be completed before call 2 from both sides, based on the area of standardisation and on the RT's/ RMA's standardisation needs.

RTs will provide insights for the expert to draft final recommendations on potential issues to be solved or further actions to be taken by the RTs.

A second call is organised with the objective to have a touch point on progress of RTs and to ask questions or deal with any issues that have come up while doing the assigned tasks.

Step 3 - Providing recommendations

Having completed the tasks identified in step 2 the expert will provide a series of recommendations and actions that the RTs/ RMAs should carry out in the future to continue the work.

After reviewing the recommendations, the RTs/ RMAs schedule a follow-up meeting with the expert or communicate asynchronously via email to discuss specific ways of adopting the recommendations. For example, they can define a timeline for the adoption of the recommendations and identify specific **actions they would like to prioritize** before the end of the consultancy period.

Step 4 - Final report and feedback

By the end of the service, the RT will receive a summary **report** compiled by the expert with the description of the meetings, activities performed, and recommendations made:

- Details of the meetings held
- Standardisation readiness assessment
- The list of the tasks that were carried out
- The list of standards and/or committees that are of interest to the project.
- Recommendations

A feedback survey has to be filled in by the research team on the platform at the service completion.

3.4 Preparation to match with third parties

3.4.1 Scope

The **preparation to match with third parties** is a structured service aimed at facilitating the market uptake of KERs by enabling an effective matchmaking between RTs/ RMAs with their key

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stakeholders. In particular, this service supports the effectiveness of matchmaking events organised within the Facility by better preparing RTs/ RMAs for a successful deal and/or agreement with key innovation stakeholders.

Key objectives of Preparation to match with third parties are:

- developing solid pitching decks,
- improving presentation skills,
- facilitate access to follow-up initiatives.

The operational framework of this service is built upon a demand-oriented approach, incorporating the principles of the lean startup methodology.

The approach builds on previous expertise gained from partners in similar international initiatives such as the Horizon Results Booster, Invest Horizon and the AAL2Business services, integrating best practices and lessons learned to create a robust and adaptable methodology.

Participants receive specialized training to effectively present the unique value proposition of their KERs, allowing them to catch the attention of early investors (like business angels and crowdfunding platforms) and/or potential business partners.

The preparation to match with third parties will serve also as a structured learning environment where participants can enhance their pitching skills and capacities, to be used in any further occasion outside the scope of the Facility.

During the Facility is expected to implement **30+ editions** of this service.

3.4.2 Access procedures

The Preparation to match with third parties service is designed to support RTs/ RMAs with KERs at higher maturity level. Each edition will accommodate a maximum of **10 RTs/ RMAs representing 1 KER each**.

RMAs are given the opportunity to participate in the programme as part of a learning experience. Their involvement allows them to gain practical insights into access to funding processes, enhancing their capacity to support future initiatives. Similar to the Academy, the structured involvement of RMAs plays a key role in enhancing institutional knowledge and reinforcing the wider ecosystem of research and innovation management.

The main criteria to be considered by KAMs to propose participation in the Academy to applicants are:

- Successful completion of the D&E Academy;
- Good progress demonstrated at the end of the D&E Academy, as per recommendation from the experts;
- Need to get in contact with key innovation stakeholders.

The participation of RTs/ RMAs to the D&E Academy gives experts the opportunity to deeply assess their KERs and recommend the use of the Preparation to match with third parties only to the most promising ones.

Only in particular cases, the KAM can give access to the Preparation to match with third parties, without having participated in the D&E Academy. During the deeper assessment meeting (see The assessment of applications and the role of the Key Account Manager (KAM)…), RTs/ RMAs should have clearly demonstrated that:

- they developed a complete business plan for their KER;
- they have already participated to pitching/matchmaking sessions (even if they were not successful);
- have scheduled the participation to a pitching/matchmaking event.

Access to a single edition of this service can be granted also to RTs/ RMAs coming from two (2) or more different applicants (organisations), however the upper limit of RTs/ RMAs still remains the same. In this case, it is important to consider geographical proximity of RTs/ RMAs as one of the priorities for the selection. This allows higher optimization of resources, due to organisational aspects and logistics related to the implementation of in-person workshops foreseen during the service.

Successful completion of the preparation to match with third parties is a mandatory requirement for all RTs/RMAs prior to accessing matchmaking events of the Facility. This structured preparation process is designed to ensure that participants enter matchmaking sessions with a well-developed presentation strategy, a clear and compelling articulation of their innovation's market potential, and the necessary skills to engage effectively with key innovation stakeholders.

3.4.3 Workflow procedures

General approach and methodology

The preparation to match with third parties consists of three interconnected workshops, complemented by individual coaching sessions, to provide participants with essential tools and peer-learning opportunities.

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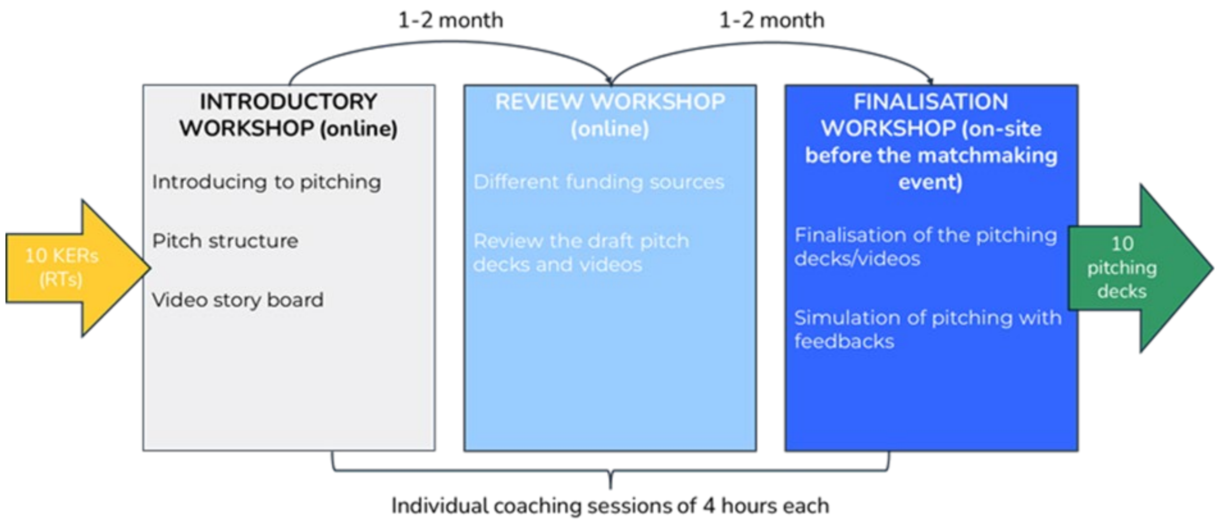

Fig.3: The scheme of the Preparation to Match with 3rd Parties

Resources needed

The delivery of the preparation to match with third parties requires at least the following staff:

- 1 senior expert specialised in access to funding;
- 1 junior expert to support senior expert.

When appointing experts for the delivery of the preparation to match with third parties, the KAM should pay particular attention in considering previous experiences with supporting business development, access to funding sources, pitching.

The following main tools are used during the delivery of the preparation to match with third parties. The tools are available on the Platform for the Expert and the selected beneficiaries:

- The **Lean Canvas:** it functions as a dynamic progress-tracking tool, enabling RTs/ RMAs to systematically outline their strategic roadmap. It facilitates structured coaching sessions and acts as a scorecard, allowing beneficiaries to visualise their progress while continuously adapting their approach. A key component of this tool is the Value Proposition, which plays a crucial role in shaping a clear and compelling offering for potential adopters.
- The **Pitching Deck**: serves as a starting point for beneficiaries to begin developing their pitch decks in preparation for the matchmaking events.

- The **Story Board Video**: provides an initial framework for beneficiaries to start creating their storyboard videos, supporting the development of clear and compelling narratives for matchmaking events.

Experts are also provided with the templates for the presentations (ppt) to be used during the workshops (the presentations are uploaded on the Platform as well). In particular:

- ppt1 is used during the first workshop,
- ppt2 is used during the second workshop,
- ppt3 is used during the third workshop.

Since the **final workshop** of the service is to be organised as **an on-site, in-person event**, its organisation requires the availability of suitable logistic resources (venue). The venue should allow:

- the participation of up to 20-30 people. Each edition of the preparation to match with third parties involves up to 10 different RTs/ RMAs and each of them is expected to be composed on average by 2-3 people.
- the use of technological equipment for the effective delivery of interactive sessions (microphones, video projector and screen or large display for presentation, reliable Wi-Fi connection, etc.).
- location proximity to the matchmaking event. Generally, the final workshop is organised the day before the matchmaking event. To encourage the active participation of participants across different organisations, the selection of the location should aim to minimise travel time and costs for participants attending the matchmaking event.

The online workshops of the preparation to match with third parties should be organised in a way to ensure a smooth and engaging virtual experience for all participants. This requires the use of a reliable video conferencing platform allowing:

- real-time interaction between facilitators and participants,
- creation of multiple breakout rooms for group activities or parallel discussions,
- the ability to bring all participants back into a main virtual room for plenary sessions,
- screen sharing, whiteboard functions and file sharing for interactive presentations,
- host/experts controls to manage participants, mute/unmute, or assist with troubleshooting.

Applications such as Microsoft Teams or Zoom are recommended, as they match all such requirements.

For the proper delivery of online workshops, experts need the following technical setup:

- a dedicated host account with full control over the session (not a free/basic plan),
- a stable internet connection,
- use of headsets/microphones to ensure clear audio,
- a reliable webcam with clear image quality.

It is important to note that in case of use of parallel breakout rooms, each of them should be coordinated by an expert (junior or senior). Therefore, the number of experts appointed for the service should be planned accordingly.

The delivery of the service is based on the interaction between experts and beneficiaries, which goes beyond the online/onsite workshops and coaching sessions. It is important to make available a **dedicated online workspace** as a central hub for managing resources, exchanging information, and supporting the organisation of both online and on-site sessions. Within the context of the preparation to match with third parties, such online workspaces will be made available on the widerAdvance Facility's platform.

Delivering procedures

The experts, after their official appointment, check all documents (exploitation intentions table, Lean Canvas, business plan, reports of other received service if any), which are made available for each specific assignment on the widerAdvance Facility platform.

Within one week from the appointment, experts send an e-mail to the contact persons of each RT/RMAs that will be involved in the edition, providing an initial outline of the schedule of activities and proposing a date for the first introductory workshop.

The **Introductory Workshop** takes place online within one (1) month from the expert appointment. It has the main objective of consolidating inputs for the pitch and introducing participants to essential tools for effectively pitching their KERs.

Two (2) weeks before the Introductory Workshop, experts should confirm the date and send the invitations to the participants. As a preparation of the Introductory Workshop, experts finalize the slides to be used (using the available template on the online platform) and provide comments and suggestions to the received Lean Canvas (business plans, or any other similar material) to be further discussed during the workshop.

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A tentative agenda for the Introductory Workshop is the following:

1st Introductory Workshop Agenda – Online	
10'	Ice Breaking and introduction to the workshop
50'	Reviewing Lean Canvas/Business plans (breakout rooms)
15'	Coffee break
40'	Presenting follow-up options
30'	Introducing pitch structure and/or video story board
15'	Wrap up & End of meeting

The session begins with an ice-breaking activity, where participants should be encouraged to introduce themselves and share a brief insight into their pitching background. This initial interaction serves to establish a sense of community and comfort, promoting active engagement throughout the session. It is essential to set the context for the workshop, outlining the objectives and explaining how each session contributes to the overall impact of the programme.

Participants then engage in breakout room discussions with the experts, focused on reviewing their Lean Canvas (or business plans or any other available document) to set a solid ground for the preparation of their pitch.

The second part of the workshop is focused on introducing different follow-up options that RTs may select to secure exploitation of their KERs, including early-stage investments, crowdfunding, industrial and/or commercial partnerships agreements, further public funding, etc. Different typologies of interlocutors are presented, explaining their expectations and how they should be approached through pitching. Based on this presentation participants select the typology of pitch they should develop (pitching deck and/or video pitch).

In the final part of the workshop experts present the tools to be used for structuring a pitching deck and video storyboarding.

At the end of the workshop experts ask participants to create a first draft of their pitching deck and/or their draft video in view of the next Review Workshop.

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After the Introductory Workshop, individual online coaching sessions are made available to each RT/ RMA to support them in the preparation of their draft pitching decks and/or videos. Each RT/ RMA can request an overall amount of individual coaching session of four (4) hours to be distributed throughout the whole duration of the edition. Experts keep track of the coaching hours "consumed" by each RT/ RMA on the online platform.

The Review Workshop is conducted online up to two (2) months after the Introductory Workshop to help participants refine and strengthen their pitching decks and/or videos. The workshop aims also to foster confidence in presenting KERs concisely while engaging with a broader audience.

As a result, participants have a deep understanding of:

- How to tailor their messaging for the different stakeholder audiences.
- How to clearly communicate the value and potential impact of their KER.

Two (2) weeks before the Review Workshop, experts should confirm the date and send the invitations to the participants as well as a reminder to send back their draft pitching decks and/or videos.

As preparation of the Review Workshop, experts finalize the slides to be used (using the available template on the online platform) and provide comments and suggestions to the received pitch decks and videos, to be further discussed during the workshop.

A tentative agenda for the Review Workshop is the following:

2nd Review Workshop Agenda – Online	
15'	Introducing the day
60'	Reviewing the draft pitch decks/video (breakout rooms)
15'	Coffee break
30'	Methodologies for pitching research results
15'	Wrap up & End of meeting

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The first part of the session is dedicated to reviewing participants' draft pitching decks and/or videos using breakout rooms (if needed). At this stage, the emphasis should be on providing targeted, actionable suggestions and recommendations, pointing out strengths while also identifying areas for improvement in structure, clarity, storytelling, and audience engagement. It is beneficial to offer specific strategies for refining pitches, such as improving narrative flow, enhancing visual elements, or adjusting tone to suit different audiences.

In the second part of the workshop the experts outline the overall approach for effectively pitching KERs, focusing more on effective communication skills and methodologies. Best practices can be shared to illustrate the dos and don’ts.

The workshop concludes with a wrap-up discussion, reinforcing key takeaways and providing participants with clear next steps for further refinement of their pitches.

After the Review Workshop, each RT/ RMA can request to have individual coaching sessions with the experts to receive tailored support for the finalisation of their pitching deck and video.

The Finalisation Workshop takes place generally on-site the day before the matchmaking event. The objective is to provide participants with the opportunity to refine their pitching decks and/or videos as well as to have practicing sessions before pitching in front of target stakeholders.

The location for the Finalisation Workshop should be agreed and confirmed at least four (4) weeks before the workshop, to allow participants better organisation.

Two (2) weeks before the Finalisation Workshop experts send to the RTs/ RMAs a reminder about the place, date and time of the workshop and receive back the updated pitch decks and videos.

A tentative agenda for the Finalisation Workshop is the following:

3rd Finalisation Workshop Agenda – On-site	
15’	Introducing the day
100’	Practicing presentation: simulated session and feedback
20’	Coffee break

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60’	Finalisation of the pitching decks/videos
15’	Wrap up and final remarks

The first part of the workshop is dedicated to practicing: participants simulate a real pitching scenario, and constructive feedback is provided by experts, focusing on delivery style, body language, confidence, and audience engagement. Practicing in front of other RTs/ RMAs gives the opportunity of mutual learning and identifying further areas for improvement.

The second part of the workshop is dedicated to the finalisation of the pitching decks/videos. Experts provide targeted guidance to refine messaging, streamline structure, and eliminate any unnecessary elements that might detract from the core message. Experts focus also on clarity, coherence, and visual appeal of the pitching decks/videos.

Participants are then asked to upload on the online platform their final versions of the pitch decks and videos, based on the suggestions received.

After the matchmaking event, each RT/ RMA may request individual coaching sessions to analyse feedback received during the event and to identify appropriate next steps for further development.

At the end of the preparation to match with third parties the experts have to prepare a final report including:

- the main achievements and progresses made by participants,
- the level of maturity reached by each KERs,
- specific recommendations to participants on next steps.

The recommendations in the final report should also specify if additional services from the Facility are suggested to the different RTs/ RMAs. In particular, recommendations have to be provided about the readiness for the *Matchmaking events.*

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4. Trainings, webinars and events

4.1 Awareness raising webinars

4.1.1 Scope

This initiative involves the organisation and delivery of awareness-raising webinars addressing the general aspects of dissemination and exploitation (D&E). These webinars are specifically designed to educate beneficiaries-particularly those within the Widening countries-on the critical importance of D&E, thereby complementing the specialised instruction provided through the academies. The sessions cover essential topics, including the contractual obligations inherent to EU programmes and the technology transfer process. Moreover, these webinars aim to elucidate the foundational policy framework underpinning D&E and to present the diverse valorisation instruments made available by the European Commission and the broader EU framework 4.1.2 Access procedures

These webinars are not restricted to any group of beneficiaries. On the contrary, they are open to any stakeholder interested in finding out more about the D&E. Registration to each event will be necessary through the project's website.

The awareness raising webinars will be recorded and be available at the project's website.4.1.3 Workflow procedures

Equally to the training webinars, the Training Plan available to the KAM will include a seperate schedule with awareness raising webinars and their respective schedules. It is up to the KAM to recommend the attendance of any of the webinars.

4.2 Training webinars

4.2.1 Scope

These are training webinars, namely in-depth seminars, aimed to build knowledge on specific D&E issues which are mainly complementary to the individual services of the Academy. There is a standard portfolio of subjects which will be enriched with further subjects that will arise as insights by the KAM or during the consultation sessions between NCP hosting organisations/local partners with the prospective clients of the Facility.

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The webinars will be of 2,5 hour maximum duration and will be delivered periodically at designated dates, as close as possible to the delivery of Academies. The webinars will be recurrent, namely only a subset of the actual webinars will be unique subjects and be repeated periodically.

4.2.2 Access procedures

These in-depth webinars will be available only to the beneficiaries of the Facility following registration at the project's website.

The training subjects and the dates are indicated in a Training Plan already approved by the European Commission and will be repeated at designated intervals. Past training webinars will be available in a non-public space of the project's website for record-keeping purposes.

The KAM should be able to indicate if any important/suitable training subject is missing from the Training Plan.

4.2.3 Workflow procedures

The KAM will have access to a Training Plan with training webinars foreseen throughout the duration of the Facility. Training Plan will be approved twice by the EU in the form of respective deliverables.

4.3 Networking events for participation in competitive calls

International brokerage events for the formation of project consortia that will either further mature KERs (upstream synergies) or allow the demonstration of solutions at operational environments (downstream synergies).

4.3.1 Scope

This service aims to utilize the brokerage events available at European level with the ultimate goal to foster collaborations for project consortia. There are brokerage events which are more suitable for key exploitable results at low to high TRL (2-8) while other events target higher ones, namely TRL 5-8. Brokerage events are based on specific calls for opportunities of Horizon Europe, on Hackathons (solutions oriented), on partnering opportunities organized by the EIT, on industry sectors organized by the Enterprise Europe Network. Moreover, there are brokerage events which are accessible on a membership basis such as the crowdhelix or association-based such as e.g.: the AI Data Robotics Association.

4.3.2 Access procedures

As soon as the KAM has a good understanding on the state of maturity of key exploitable results, he/she may include within the Service Plan the service "Networking events for participation in competitive calls" and more specifically opt for events that would enhance partnering opportunities for further pre-competitive maturation or for events targeting already more mature solutions.

In the majority of cases, the KER holder can additionally participate in pitching sessions to present its project idea. Especially the ones organized by networks of National Contact Points have a favorable number of pitches coming solely from the widening countries.

Indicative examples (to facilitate understanding):

For KERs between TRL 2-8

- Examples of Partnering/Brokerage events for Horizon Europe:
  - Brokerage events for EU calls, such as CBE, Clean Aviation etc.
  - Successful R&I Europe series. See for 2025: https://horizont.zenit.de/en/events/successful2025/
  - Crowdhelix type of activities: https://crowdhelix.com/events/crowdhelixs-2025-event-schedule#Brokerage-events

For KERs between TRL 5-8

- All the above plus following examples:
  - "Leading lights" edition of events, ie for sustainable manufacturing. It features industrial stakeholders and thus targets mid to higher TRL KERs
  - "Open Innovation Challenges" type of events where industrial manufacturing companies look for sustainable solutions
  - Tech hub type of events such as Health Tech Hub Styria

The majority of brokerage events at the EU landscape will be available in a dedicated Matrix at the disposal of the KAM. The design of the Matrix will cover all important categories for KAM's orientation such as:

- Event name;
- Short description;
- Date & Place;

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- Expected participants;
- Requirement for TRL or equivalent , where applicable (note: in case of brokerage events for Culture, TRL or other indications may not be applicable);
- Pitching session availability;
- Link to more information;
- Other modalities such as registration fee and other access requirement that may apply on a case by case.

4.3.3 Workflow procedures

The KAM should be able to suggest within the Service Plan the most appropriate ones, judging on the TRL maturity. The KAM should urge the KER holders to have attended or accessed the recorded version of the awareness-raising webinar "How to use effectively EU networking instruments".

Attention should be paid by the KAM so that participation in brokerage events does not canibalise potential interest for the service "Matchmaking events and Open Days" (see below).

4.4 Study visits

Study visits are in place to support the RMA staff, especially those involved in the valorisation of knowledge indicated in the application.

4.4.1 Scope

The purpose of the study visits is to allow tech transfer and IP specialists of the RMA category of the non-research staff, from beneficiaries of the Facility to visit excellent organisations in Widening countries. This way they can learn from the best practices developed by other organisations who face or faced similar bottlenecks within Widening countries, such as research-support structures, governance and modus operandi. This will help these non-research staff foster their own collaborative networks and promote peer-learning opportunities.

4.4.2 Access procedures

There will be one study visit per year to a research-based host from a Widening country of Horizon Europe. The KAM will have this information alongside the Training Plan and the Matrix. Each study visit should host up to 20 persons. The Facility does not cover the travel expenses of the RMA staff of the Beneficiaries.

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Study visits will be accessible by priority to the beneficiaries of the Facility, ideally to 1-2 persons from the same organisation. In case of available seats, the Study Visits will be opened to the ecosystem by way of announcement at the project's website.

4.4.3 Workflow procedures

The applicants to the Facility will have to indicate the names of the RMAs during application. Following approval of the application, the beneficiaries will provide more details during the Engagement Meeting, which will include among others:

- description of valorisation activity (collaboration with industry, other stakeholders) if any, as well as work experience with IRP protection (patents, licensing, spin-off creation), if any
- confirmation of English proficiency.

4.5 Matchmaking and Open Days

20+ on-site events are foreseen which will be organized during the project lifespan, with the participation of on average 60+ participants depending on the location and critical mass of teams with selected KERs for pitching.

4.5.1 Scope

Selected (those which qualify for further D&E) Key Exploitable Results documented in WP1, will be showcased for purposes of dissemination and possibly also for exploitation (pitching) at dedicated regional events. Those events will be a combination of events featuring showcasing/pitching of technologies and other research findings suitable for evidence-based policy, they will bring together the Facility beneficiaries with investors, industrial partners and policy makers and the EC. The events will include several sessions like a pitching session with investors, networking sessions with stakeholders or round table discussions with regional/ national policy makers.

- **KPIs**: At least 30% of RTs will obtain expressions of interest from other stakeholders

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4.5.2 Access procedures

Only those KER holders who qualify for further D&E should be able to receive this service and most specifically, retroactively to the Academies. This is due to the need to group and synthesise KERs to produce a more coherent events.

On average, 5+ Research Teams (RTs) / Research Management Administrators (RMAs) will participate in each event **with the right to pitch**.

Pitching sessions will be reserved exclusively for those who have completed services under T1.7 – Preparation to Match with Third Parties, prior to the event.

The expert may retrieve information from the project portal

4.5.3 Workflow procedures

Time: The events should start in early 2026, once a critical mass of Facility beneficiaries with Key Exploitable Results (KERs) is ready to be presented to early adopters, venture capitalists (VCs), and other stakeholders.

Choice of place

KERs per country will be grouped, so that matchmaking and open days can be organized on a regional basis (e.g.: Baltic States). Effort will be made to ensure that these events are geographically distributed. Nonetheless, when necessary (depending on the volume of results) events may be organized more than once in a certain region(s).

Suggested format

- Who can participate: All Facility beneficiaries are eligible to attend, but **Pitching sessions will be reserved exclusively for those who have completed services under T1.7 – Preparation to Match with Third Parties**.
- **Event capacity**: In larger countries with a significant critical mass of Facility beneficiaries and KERs – approximately 80 participants in total.
  In smaller countries – approximately 60 participants in total.
- **Format**: One-day, on-site events featuring:
  - Pitching sessions
  - Matchmaking sessions
  - Networking sessions

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    - Roundtable discussions with regional/national policymakers
- **Invited stakeholders**:
    - Early adopters
    - Venture capitalists (VCs)
    - Industry representatives
    - Socio-economic partners
    - Policy makers
    - Industry associations (and related other stakeholders)
    - European Commission

5. Support on synergies

5.1 Coaching on synergies

5.1.1 Scope and access procedures

The scope of this service will provide individual and group coaching to *Facility* beneficiaries to overcome the difficulties encountered when interfacing between two different funding systems where major barriers still exist when applying synergies to valorise research results. This service will entail giving personalized assistance to participants, which will be provided through a one-to-one coaching and advisory service. The trajectory of each beneficiary will be studied (including individualized surveys and interviews) to determine the main barriers towards dissemination and exploitation of their results. Then a course of action and alternatives will be developed jointly. Furthermore, this service will also be extended for group coaching on issues of general interest of the service beneficiaries.

The access procedures will be through the application in WP1 and becoming beneficiary, NCPs and Ambassadors will be trained to execute the service.

5.1.2 Workflow procedures

The service will look as follow:

- **Months 1-3** (for each beneficiary). The first part will be learning about the individual cases and the identification of problems encountered. For this, the beneficiary will undergo an

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on-line survey with questions that can be adapted to each case. If some points are not left clear, a second survey can follow. Then an online or personal interview will follow. If external actors can advise the beneficiary further, it would be informed of that, and asked whether they could assist to the interview under a confidentiality agreement. Then a report with an advised course of action will be issued.

- **Months 4-5**. Further actions will depend on each case, for instance webinars, on-site trainings, meetings with suitable stakeholders.
- **Group sessions** (Months 6-8). In month 6, common problems to most beneficiaries will be identified. Then targeted training webinars will be prepared (month 6) and delivered (months 7-8). Alternatively, personal training meetings for beneficiaries from a certain region can be arranged.
- **Online sessions / Webinars**.

Various tools will be applied in the delivery service:

- For the surveys: on line tools which we will upload in the project webpage.
- For the on-line interviews: Zoom meetings, with unlimited participants and time service
- For the individual coaching, external experts can be recruited if the beneficiary agrees (for instance, fellow researchers who have transferred results before, non-competing company advisors, etc). In that case, an confidentiality agreement should be signed first.
- Draft COMMISSION NOTICE Synergies between Horizon Europe and ERDF programmes https://research-and-innovation.ec.europa.eu/document/download/6c6230d0-de1a-4280-9289-67234d8e4e94_en?filename=c_2022_4747_1_en_annex.pdf
- EU and AC MS related Programmes.

The timeline for the service delivery will be as follows (Table 4)

Table 4 Timeline for delivery of coaching

Timeline	***Steps***	***Comments***
1	KAMs will distribute identified beneficiaries amongst NCPs and Ambassadors, according to their pre-identified regions	A balance between regional partners should be sought. . It will depend on each partner capacity and number of beneficiaries per call.
2	A Preliminary survey (with the assistance of the KAMs) of the	

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	selected beneficiaries will be undertaken .	
3	Interviews with the selected beneficiaries to achieve an accurate description of the difficulties. If needed, possible solutions/external advisers could be proposed.	
4-5	Synergies Coaching should be undertaken by month 4-5 from the time the applicant becomes a beneficiary. The coaching will be adapted to each case. For instance, webinars, on-site trainings, meetings with suitable stakeholders.	
6	The NCPs/Ambassadors undertaking the coaching will be tasked to identify common problems to most beneficiaries Then, they will feed into the preparation for the group training webinars	
7-8	Group Training webinars will be delivered. These will be recorded to facilitate future access of successive beneficiaries.	
9	A satisfaction questionnaire will be distributed among the beneficiaries to collect Conclusions to feed into the Deliverable D3.4.	
10	Report of coaching results and recommendation for second cycle of coaching	

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The one-to-one synergies coaching will be tailored to each beneficiary. During the initial phase of the service, fact-finding will be undertaken to establish the exact needs of the beneficiary. By the end of the service, the widerAdvance Project would have:

- Identified problems that hinder research results dissemination and exploitation for each case. This will be done using surveys, interviews and own research (each NCP hosting organisation/Ambassador working in this task);
- Practical advisory service through the one-to-one coaching of beneficiaries. If a specific need is identified and if the beneficiary agrees, external advisers who have specific expertise within the region could be roped in ;
- During each one-to-one coaching session, an action plan will be developed by the NCP/Ambassador and the beneficiaries, also including any follow-up activities (this will be done with the help of CSIC);
- Implementation of additional activities such as training courses/webinars (if required)_etc.;
- Collection of common problems raised during the one-to-one coaching (each NCP/Ambassador with strong CSIC support) and causes of failed dissemination/exploitation according to region and activity sector;
- Recommendations for future policies (and group sessions) to be led by WP leader, CSIC & partners.

5.2 Mutual learning

5.2.1 Scope and access procedures

Mutual Learning (ML) on effective D&E practices of project results, with a focus on capacity to leverage additional funds through complementarity of programmes (ERDF, HE, RRF etc.). This will be achieved through 2 complimentary MLs – the first will showcase existing success stories to potential academy applicants and the second will showcase success stories from among the academy service beneficiaries recording high-quality performance in securing the additional funding. The Mutual Learning will be held as round table sessions during the matchmaking / open days (T2.5). The target audiences will (in both cases) be service beneficiaries as well as other organisations (not part of the widerAdvance Facility) from Widening countries and ORs. The MLs will prepare as set of recommendations on good practices and policies related to D&E activities to be referred to initiate the Policy Dialogue – this will be done through the transmission of the recommendations to the relevant national policy makers, NCPs, research attaches, and Members of the European Parliament (MEP) members of the Industry, Research and Energy (ITRE) committee.

5.2.2 Workflow procedures

Format: Two one-day hybrid events held during matchmaking/open days (T2.5).

Content:

- Session 1 M12: Showcase success stories for potential academy applicants, this will be done by mapping success stories of widening countries from the Booster.
- Session 2 M37: Highlight success stories from academy service beneficiaries excelling in securing additional funding (ERDF, HE, RRF, etc.).

Roundtables will be an opportunity to engage with experts in the field and explore what is emerging at European and national levels and the potential challenges and opportunities. Concrete experiences will be gathered from the participants, in order to value what is being done and understand together what needs to be discussed more and build potential new synergies. Participants will be able to present good practices, experiences and ideas in their registration form. A selection of the proposal received will be done and, during the event, the floor will be given to those participants with the most successful stories, in terms of capacity to leverage additional funding.

Target Audience:

- Service beneficiaries;
- Other organisations from Widening countries and ORs;
- Regional/national policy makers.

Agenda:

Event 1: M12 – Showcasing Success Stories for Potential Academy Applicants

- 09:30 – 10:00 | Welcome & Opening Remarks
- 10:00 – 11:30 | Success Stories from Widening Countries
    - Presentation of mapped success stories from the Booster
    - Case studies from successful applicants
- 11:30 – 12:00 | Coffee Break & Networking
- 12:00 – 13:00 | Roundtable Discussions with Experts
    - Emerging trends at European and national levels

    - Interactive discussion with participants
- 13:00 – 13:30 | Closing Remarks & Next Steps

Event 2: M37 – Success Stories in Leveraging Additional Funding

- 09:30 – 10:00 | Welcome & Introduction
- 10:00 – 11:30 | Keynote: Achievements of Academy Service Beneficiaries
    - Case studies of successful applicants securing ERDF, HE, RRF funding
- 11:30 – 12:00 | Coffee Break & Networking
- 12:00 – 13:00 | Roundtable Discussions
    - Practical insights from experts & beneficiaries
    - Identifying future funding opportunities
- 13:00 – 13:30 | Closing Remarks

A range of tools will be employed in the preparation phase as well as during the event:

Preparation Phase:

- Registration & Proposal Submission Platform – A tool for participants to submit best practices, experiences, and ideas for selection in the event's roundtable discussions.
- Communication & Collaboration Tools – Email, newsletters, and a dedicated online workspace to keep participants informed and engaged before the event.

During the Event:

- Pitch Deck Templates – Provided to selected participants to present their success stories and funding experiences concisely and effectively.
- Virtual & Hybrid Meeting Tools – Video conferencing platforms to support hybrid participation, ensuring seamless engagement for both in-person and remote attendees.
- Live Polling & Q&A Platforms – Tools like Slido or Mentimeter to encourage real-time interaction and audience participation.
- Document & Resource Sharing – A repository for event materials, presentations, and key takeaways accessible to all participants.

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Table 5. Event Timeline

Phase	Activity	Timeline (Before Event)
Decision to Organise	Formal approval & planning kickoff	**M-5**
Kick-off Organisation	Define objectives, structure, and key stakeholders	**M-4**
Call for Participants	Open registration & proposal submissions	**M-4 to M-2**
Matchmaking Setup	Launch matchmaking tool & facilitate pre-event networking	**M-3 to M-1**
Selection of Best Practices	Review and select participant proposals for presentations	**M-2**
Finalize Agenda & Logistics	Confirm speakers, panellists, and technical setup	**M-1**
Event Execution	Conduct hybrid event with interactive sessions	**M (Event Month)**
Post-Event Follow-Up	Share event outcomes, resources & foster continued collaboration	**M+1 to M+2**

Roundtables will be a unique platform to discuss challenges and opportunities for widening countries related to D&E practices, which will serve as the foundation for D3.6 Policy recommendations. Preliminary survey will be conducted among beneficiaries and national/regional policy makers with regards to successful D&E practices. This can be followed up by bilateral calls with representatives of success stories. Roundtables in the ML which will be held M37 will be a platform to validate the policy recommendations which will be based on the survey's findings. Transmit recommendations to policymakers, NCPs, research attachés, and ITRE committee MEP members.

Annex I – Impact indicators

6. Impact Assessment and Monitoring Framework

6.1 Overview

The widerAdvance Facility places significant emphasis on measuring the impact of its services, both in terms of the immediate outcomes achieved and their longer-term effects. The impact monitoring approach is designed to evaluate how effectively the Facility supports the exploitation and dissemination of Key Exploitable Results (KERs), strengthens organisational capacities, and contributes to sustainable innovation ecosystems across Widening Countries and Outermost Regions.

Monitoring efforts cover both **quantitative** and **qualitative** dimensions, ensuring a holistic understanding of the Facility's effectiveness.

The monitoring framework includes the following focus areas:

- **KER Exploitation** – Improvements in Adoption Readiness Levels (ARL);
- **Capacity Building** – Participant skill development and organisational improvement;
- **Visibility and Recognition** – Impact of dissemination, success stories, and stakeholder engagement;
- **Sustainable Tools and Synergies** – Long-term planning and follow-up funding;
- **Policy Influence** – Evidence-based insights and recommendations.

KPIs are structured around both output metrics (e.g. number of services delivered, organisations supported) and outcome indicators (e.g. increased KER maturity, beneficiary satisfaction, success stories).

6.2 Monitoring Methods and Tools

The Facility employs a range of tools to monitor and assess impact:

- **Quarterly online surveys** with beneficiaries to gather data on satisfaction, skill improvement, and follow-up actions;
- **Before/after maturity assessments** using the ARL scale to measure KER progression;
- **Success story collection** through short narratives and testimonials (target: 40+ stories);
- **Barrier analysis surveys** conducted at midterm and final stages (December 2026 and October 2028);
- **Follow-up interviews** or calls with selected beneficiaries 6–12 months after service delivery to evaluate impact longevity.

In line with participant privacy and engagement challenges, up to three contact attempts will be made, after which no further follow-up will occur.

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Measuring Qualitative KPIs

Qualitative KPIs are captured through structured yet flexible approaches:

- **Improved Adoption Readiness**
  - **Data collected**: ARL checklist scores pre- and post-service, expert evaluations, and feedback from early adopters.
  - **Method**: KERs are scored 0–5 on readiness dimensions such as value proposition, user validation, and IP clarity. Average score increases are calculated.
  - **Example KPI**: "Average ARL score increased by +2 points after Academy service".
- **Beneficiary Satisfaction**
  - **Data collected**: Mandatory post-service feedback forms.
  - **Key metrics**: % of participants rating the service 4 or 5 stars; thematic insights from open-ended responses.
  - **Example KPI**: "85% of participants rated the service 4 or 5 stars".
- **Visibility and Recognition**
  - **Data collected**: Testimonials, quotes, and feedback during events or webinars; number of success stories published.
  - **Outcome Indicators**: Beneficiary mentions in national media or policy events; qualitative recognition from policymakers.
  - **Example KPI**: "22 policy dialogues conducted with over 20 responses from regional stakeholders".

Notes on KPI Values

KPI targets (e.g., 750 KERs supported, 85% satisfaction) are **project-specific benchmarks** and should not be considered fixed standards for future replications. The operational manual outlines **what should be measured** rather than prescribing absolute numerical targets, except for satisfaction metrics, which are universally applicable to demonstrate quality.

6.3 Implementation Guidance

To ensure consistency and replicability:

- Each service should be followed by a **short feedback form** (5–10 minutes max);
- **Service experts** are responsible for collecting qualitative insights during and after delivery;

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- **KAMs** are tasked with coordinating surveys and monitoring responses;
- All templates, checklists, and reporting formats will be available on the online platform.

Where possible, impact monitoring should extend up to 6–12 months post-service, especially for services involving business planning or matchmaking. Due to inherent limitations in long-term monitoring, emphasis will also be placed on collecting **outcome-level** results shortly after service completion.

WiderAdvance Facility – Impact Monitoring and Barriers' Analysis plan

The main impact of the Facility, as highlighted, is knowledge valorisation, which serves as a pathway to bridge the innovation divide within Europe. This **impact will be achieved through the exploitation and dissemination of the Key Exploitable Results (KERs)** stemming from Widening projects in Horizon 2020 and WIDERA projects in Horizon Europe.

The key objectives of the widerAdvance Facility are as follows:

O1: Improve KER Exploitation: Tailored services for 750 KERs, including academies, IP, standardization, and go-to-market advisory.

O2: Ensure Long-Term Dissemination: Webinars, trainings, and study visits to build sustainable D&E skills.

O3: Boost Visibility: Showcase achievements from underserved regions through success stories, awards, and networking.

O4:Enable Sustainable Tools: Tools, matchmaking, and coaching to strengthen EU-wide synergies and research cohesion.

O5: Influence Policy: Provide recommendations and barrier analysis to shape valorisation policies. *(Table 9. Barriers Identification and Analysis)*

These objectives will be reflected in the outreach to over 1000 organisations, with tailored services provided to more than 100 of them, including 50 Academy editions, 30 pitching services, 15 standardisation services, 35 IP advisory services, and 60% of beneficiaries receiving individual coaching on synergies. Capacity building will cover over 20 topics with more than 20 matchmaking events, 4 study visits, 2 mutual learning sessions, and over 40 success stories from the facility. As a result, each organisation will be well-equipped with a portfolio of knowledge, capacities, and tools. *(Tab. 6 Overall analysis of Key services and capacity building, tab. 7 Impact Area, expected outcomes, KPIs & benchmarks, tab.8 Impact Monitoring Framework (detailed in quantitative / qualitative KPIs)*

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Project Exploitable Results will include an operating facility and replicable methodology, a capacity-building plan, and policy recommendations.

The outcomes will include:

1. Strengthened capacities of organisations and their teams in Widening countries and Outermost Regions in terms of dissemination and exploitation.
2. Increased maturity of KERs in terms of adoption readiness level.
3. Recognition of organisations and KERs.
4. Enhanced synergies between various funding opportunities.
5. Solid sustainability plans.

Table 6 Overall analysis of Key services and capacity building

Key Services	Capacity building	Barriers
The service delivery will focus on KERs generated both directly within the projects and indirectly in the same thematic domain. The services will be delivered under one umbrella, not only for research teams but also for research managers, administrators, technology transfer officers, IP experts, and management personnel from organisations.	Capacity building will cover over 20 topics with more than 20 matchmaking events, 4 study visits, 2 mutual learning sessions, and over 40 success stories from the facility. As a result, each organisation will be well- equipped with a portfolio of knowledge, capacities, and tools.	**To be identified via tailored surveys**

In total the projects generated 184 results from TRL 2 to TRL 9, with the majority placing at TRL 3 – 26% and TRL 4 – 28% being diversified between instruments.

Key Exploitable Results (KERs) generated either directly through the widening action or indirectly within its thematic context – the goal is 750 KERs.

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Table 7 Impact Area, expected outcomes, KPIs & benchmarks

<table>
<tr><th></th><th>Service type</th><th>Objectives</th><th>KPI</th></tr>
<tr><td>Services</td><td>1. Academy editions (50+)
2. Pitching services (30+)
3. Standardisation services (15+)
4. IP advisory services (35+)
5. Individual coaching on synergies</td><td rowspan="2">O1: Improve KER Exploitation: Tailored services for 750 KERs, including academies, IP, standardization, and go-to-market advisory.

O2: Ensure Long-Term Dissemination: Webinars, trainings, and study visits to build sustainable D&E skills.

O3: Boost Visibility: Showcase achievements from underserved regions through success stories, awards, and networking.

O4: Enable Sustainable Tools: Tools, matchmaking, and coaching to strengthen EU-wide synergies and research cohesion.</td><td>• Number of organisations reached (target 1000+)
• Number of organisations involved in Facility services (target 100+)
• Number of Individual plans prepared (through academy service)
• Number of staff trainings delivered on D&E (through academy service)
• Number of pitching services
• Number of KERs (tracked by TRL as a measure of maturity)</td></tr>
<tr><td>Capacity Building</td><td>1. Matchmaking events (20+)
2. Study visits (4+)
3. Mutual learning events (2+)
4. Success stories (40+)</td><td>• Number of networks created (organization/researcher links to industry, VCs, Investors, etc. through matchmaking events)
• Number of success stories
• Number of study visits
• Number of MLE</td></tr>
</table>

Qualitative results (e.g., success story quality, policy influence) should be supported by short narratives or testimonials in reports.

Quantitative KPIs are mostly based on **aggregated service and event reports**, CRM system outputs, and participant surveys.

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Table 8 Impact Monitoring Framework (detailed in quantitative / qualitative KPIs)

Impact Area	Expected Outcome	Quantitative KPIs	Qualitative KPIs
Improved KER Exploitation	750+ KERs supported via tailored services (Academy, IP, Standardisation, Pitching)	- 750 KERs individually assessed- 50 Academy editions- 30 Pitching service editions- 15 Standardisation service editions- 35 IP advisory services	- Improved adoption-readiness of KERs- Beneficiaries' satisfaction with services (>80% positive)
Long-term D&E Capacities	Sustainable skills among researchers and RMAs	- 20+ D&E topics covered- 40+ online trainings and webinars- 4 study visits organized	- Beneficiaries report increased skills to comply with HE MGA obligations (>90%)
Boosted Visibility and Recognition	40+ success stories showcased	- 40+ success stories collected and published- 22+ local events and policy dialogues organised	- Greater recognition of Widening organisations at national/regional levels- Policy-makers express increased interest (>20 feedbacks)
Enabled Sustainable Tools	Sustainable networking and synergies building	- 20+ matchmaking events- 60% of participants receive synergy coaching	- Sustainable D&E Plans prepared by 40%+ beneficiaries
Policy Influence	Barrier analysis and policy recommendations delivered	- 2 barrier analyses (at M24 and M46)- 1 policy recommendations report	- 80% of national/regional authorities targeted with recommendations

Table 9 Barriers Identification and Analysis

Barrier	Detection Method	KPIs for Monitoring	Mitigation Approach
Weak valorisation ecosystems	Surveys to RTs and RMAs (via baseline and follow- up)	% of organisations lacking valorisation strategy at baseline	Capacity-building through Academy and IP/standardization trainings

Lack of collaboration trust culture	Interviews and post-event surveys after matchmaking	% of teams establishing collaboration Agreements	Sharing success stories, matchmaking events fostering trust
R&I system weaknesses in Widening Countries	Comparative TRL/ARL and uptake analysis (before/after support)	% increase in ARL levels per KER	Awareness raising, evidence-based recommendations to policymakers
Limited downstream synergies (ERDF, ESF, RRF)	Surveys during synergy coaching and matchmaking	% of participants accessing follow-up funding	Provision of synergy matrix, coaching, and Open Days

Data Collection Plan

- **Quarterly Surveys** among supported organisations (RTs, RMAs) measuring satisfaction, D&E skills improvement, trust building, synergies created.
- **KER Maturity Assessments** (at entry and exit): tracking TRL and ARL progress.
- **Success Stories Collection**: gathering 40+ narratives with direct beneficiary testimonials.
- **Barrier Analysis Surveys**: distributed at M24 and M46 to all participants + regional policy actors.
- **Policy Dialogue Feedback Forms** after 22+ sessions to track recognition and policy impact.

How to Measure Qualitative KPIs for WiderAdvance?

1. **Qualitative KPI: *Improved Adoption Readiness of KERs* (**How mature and ready KERs are for market/policy adoption after support)

Data to Collect:

- **Before/after maturity assessments** (using Adoption Readiness Level - ARL scale)
- **Expert evaluation forms** (short feedback from coaches/experts)
- **Early adopter validation feedback** (short interviews or survey forms)

Measurement Method:

- Create an **ARL checklist** (based on criteria like UVP validation, IPR clarity, customer discovery, etc.)

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- Score each KER **before** and **after** Academy or other service (0–5 scale per criterion).
- Calculate **average improvement** in ARL score.

Example metric:

"Average ARL score increased by +2 points after Academy service."

2. **Qualitative KPI:** ***Beneficiaries' Satisfaction with Services*** **(**Whether participants found the services valuable)

Data to Collect:

- **Post-service surveys** (mandatory 5-minute survey after each service).
- **Key questions:**
  - Satisfaction rating (1-5)
  - Was the service relevant to your needs? (yes/no + comment)
  - Open-ended question: "What was most useful?"
  - Open-ended question: "What should be improved?

Measurement Method:

- Calculate % of services rated 4 or 5 stars ("positive rating").
- Thematic analysis of open-ended answers (group common themes, e.g., "coaching effectiveness", "practical advice")

Example metric:

"85% of participants rated the service 4 or 5 stars."

3. **Qualitative KPI:** ***Increased Visibility of Widening Beneficiaries*** (Whether organisations and their results became more visible nationally or internationally)

Data to Collect:

- **Success story publication metrics**:
  - How many times each success story was viewed/shared.
- **Press coverage records** (articles, blogs mentioning supported organisations).
- Stakeholder interviews (e.g., feedback from NCPs, local policymakers).

Measurement Method:

- Track views, downloads, shares using web analytics.
- Count external mentions.
- Qualitative coding of stakeholder interviews to detect positive recognition (e.g., "The success story made policymakers aware").

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Example metric:

"Success stories received 10,000+ combined views; 10 mentions in regional media."

4. **Qualitative KPI:** ***Impact on Policy Awareness*** **(**Whether policy recommendations and barrier analyses triggered awareness among authorities)

Data to Collect:

- **Feedback forms** after policy dialogue events (short 5-question form).
- **Policy-maker testimonials** collected via interviews or email.
- **Evidence of follow-up actions** (e.g., invitation to advisory boards, inclusion into regional strategies).

Measurement Method:

- Track % of policy event attendees who rate the recommendations as "useful".
- Document specific cases where policy suggestions were incorporated or discussed in policymaking forums.

Example metric:

"70% of policymakers found barrier analysis useful; 3 recommendations cited in regional strategies."

Summary of the instruments for measure qualitative KPIs presented in the Table 10 below:

Table 10 Summary Table for Quick Reference

Qualitative KPI	Data to Collect	Measurement Tool	Frequency
KER Adoption Readiness	ARL Scoring Sheets, Expert Feedback	Before/AfterService Assessment	Per Service
Satisfaction with Services	Survey Ratings + Open Comments	Post-Service Surveys	Per Service
Visibility Increase	Views/Downloads, Media Mentions	Analytics Reports, Media Monitoring	Quarterly
Policy Impact	Feedback Forms, Interviews, Follow-up Evidence	Post-Event Surveys, Testimonies	Bi-annual

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