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LIVE WEBINAR

EXPERT INSIGHTS

Exploitation and innovation routes in Horizon
Europe projects

MARCH 9, 2023 11:00 - 12:00 (+30 MIN Q&A)



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Researchers are crucial in today's world and I want to do my part to help them.



Gabriella LOVÁSZ

Managing Director of @Europamedia

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In this webinar Gabriella Lovász, managing director at Europa Media, will present some of the new requirements in terms of innovation in Horizon Europe, as well as the exploitation of R&I results.

Today's Topics:

- How to support the research team to better address innovation
- What research organisations can do to successfully exploit projects results
- Practical examples will be demonstrated

This webinar is presented by EMDESK in cooperation with Europa Media.

EMDESK is a project and work management solution for research and innovation projects.

It helps large teams across organisations to organise and collaborate in EU funded projects while keeping maximum control and transparency.



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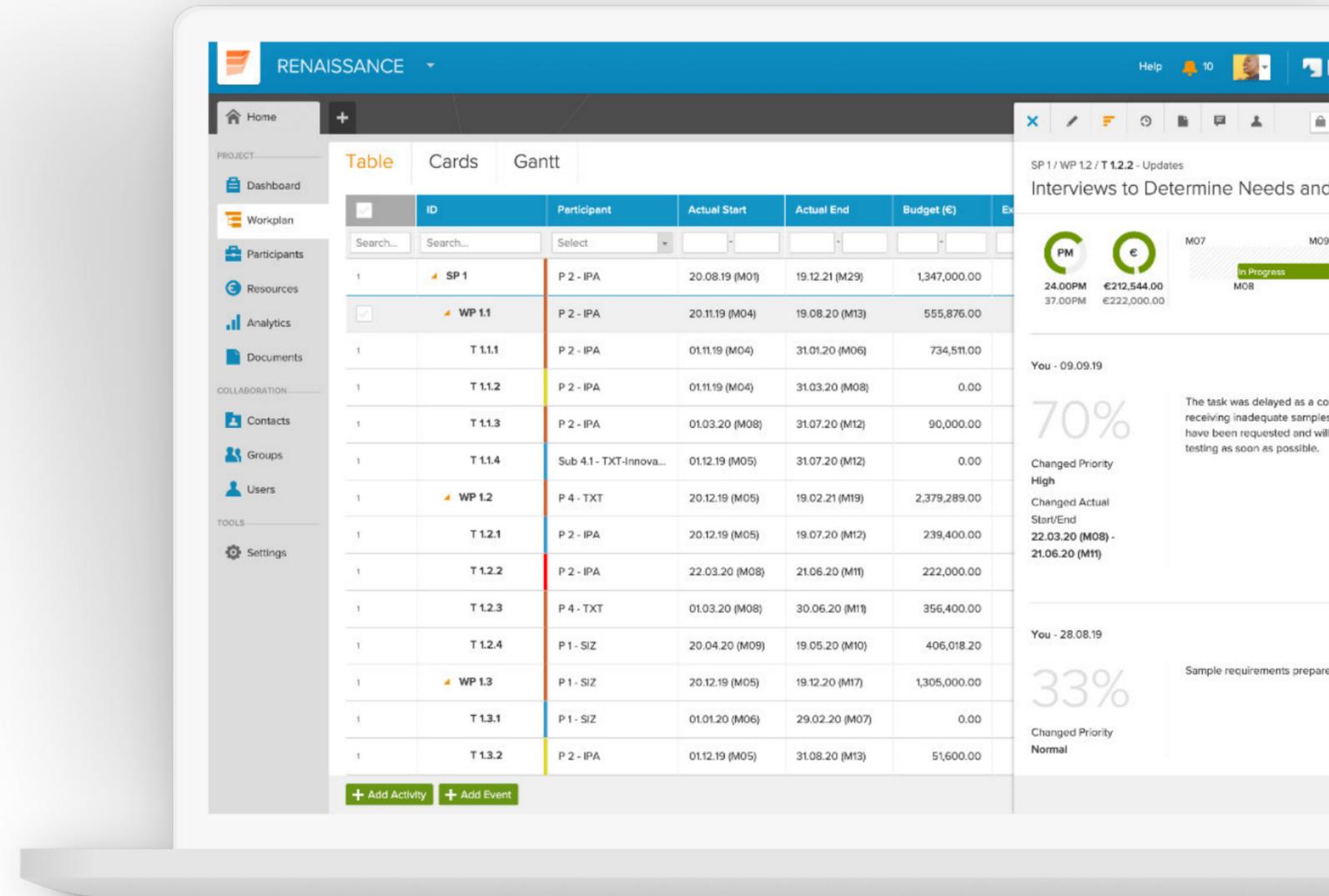
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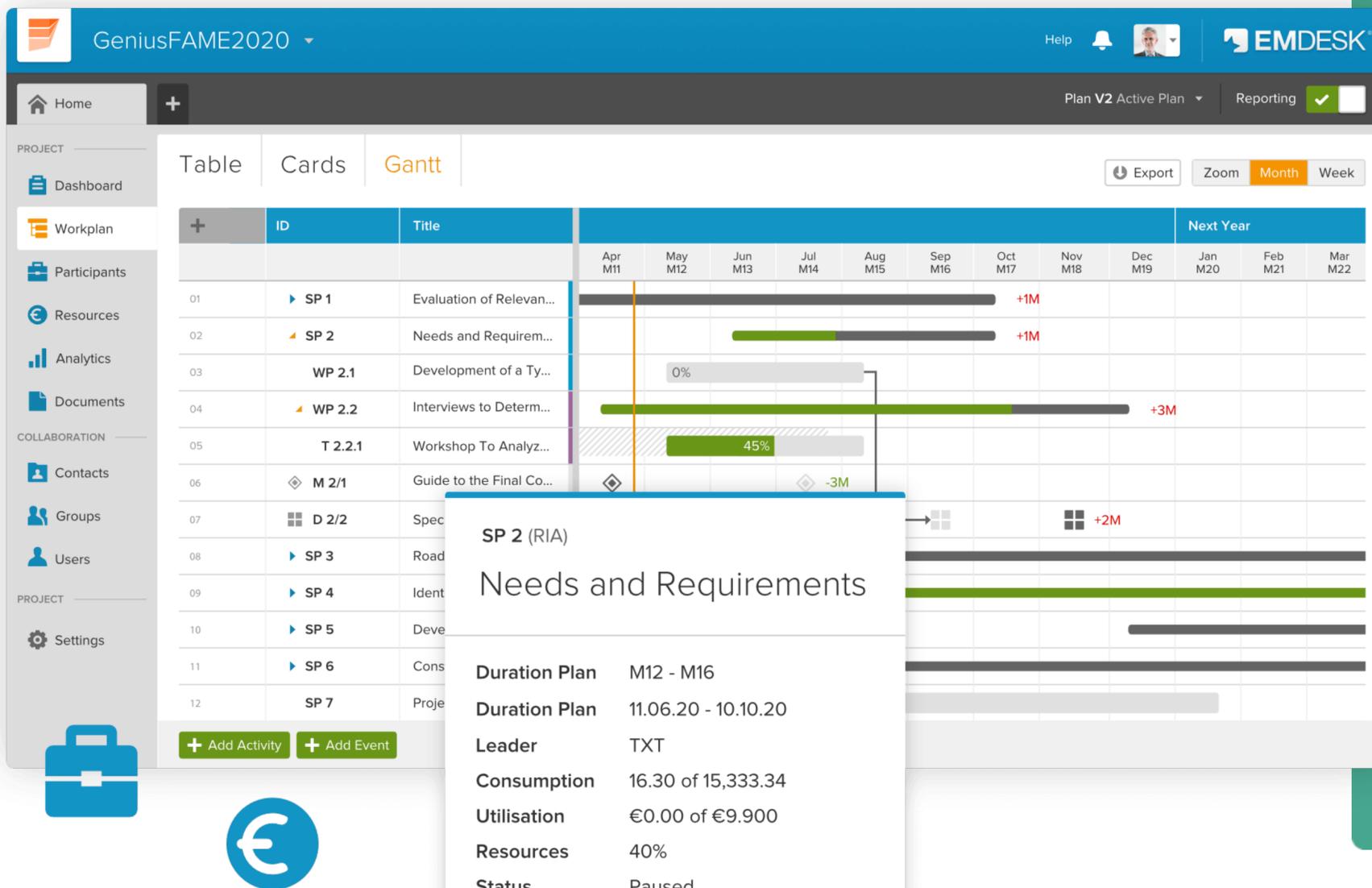
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EU PROJECT
COMPLIANCE (H2020)



An all-in-one solution for the entire lifecycle of projects of any scale and complexity with the flexibility to customise to specific needs.

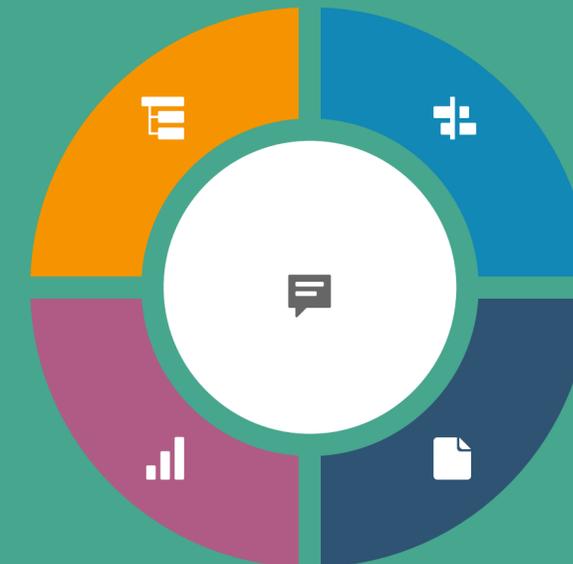


Plan & Organize

Design and budget projects of any scale

Execute & Report

Gain control by building reports that matter



Collaborate & Communicate

Increase productivity with efficient communication

Control & Analyse

Take control with power analytics

Write & Review

Create documents and collaborate real-time

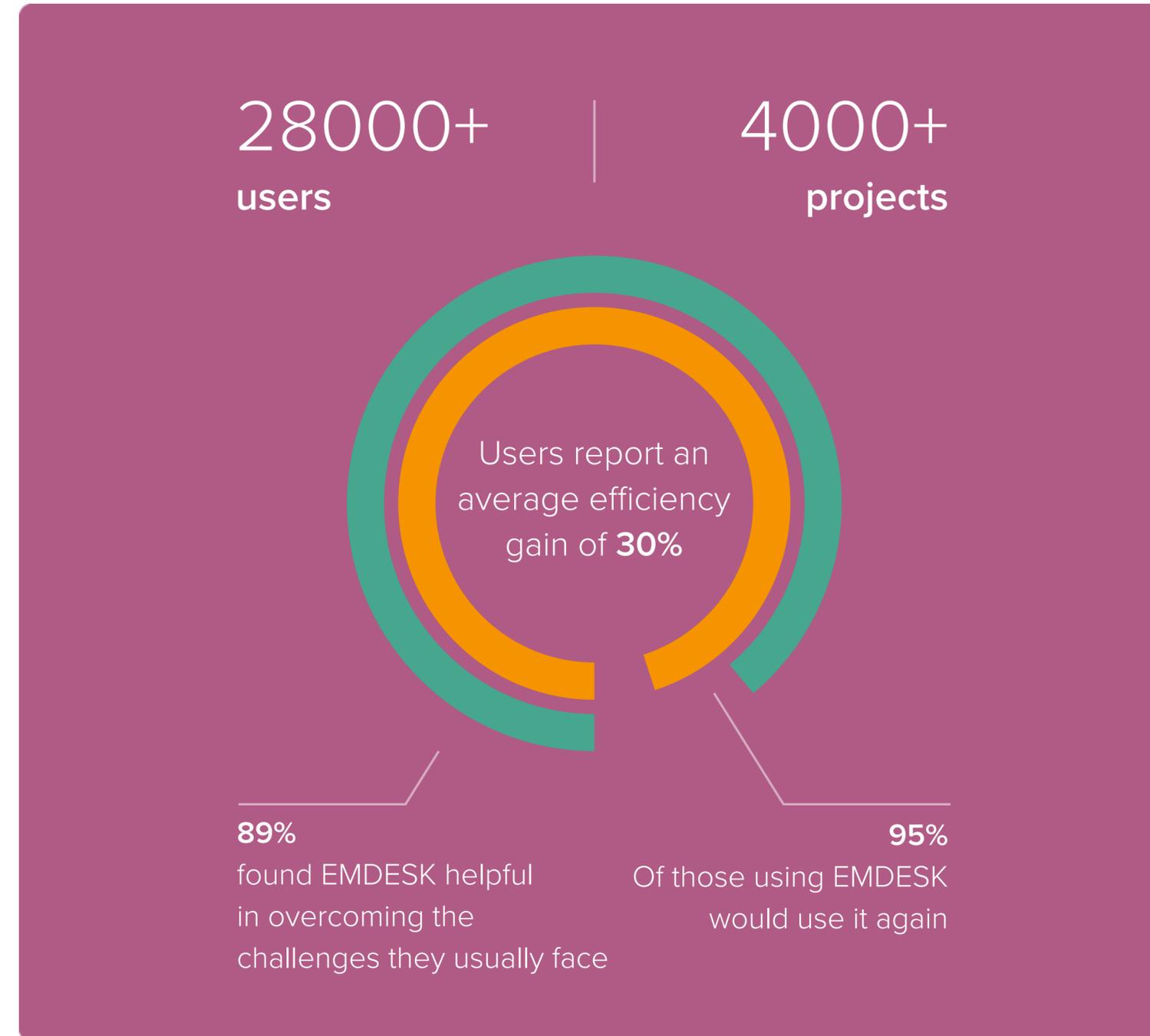
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- Our customers report an increase in efficiency of more than 30%
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- from small to billion Euro projects involving 150+ organisations (like EU flagships HBP and Graphene)



“Combining a personal service with flexibility and solution-oriented thinking, EMDESK is a highly reliable solution that helps us to manage and monitor all our project activities efficiently.”

Dr. Katarina Boustedt
Head of Administration of the EU FET Graphene Flagship at Chalmers University of Technology



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**Europa Media/EMDESK
webinar**

Exploitation and innovation routes in Horizon Europe projects

**Speaker: Gabriella Lovász
Europa Media**

11:00 – 12:30 CET // 09 March 2023

SPEAKER

Gabriella Lovasz

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Definitions

Innovation

Definitions (1)

Innovation in all its forms

= any result from R&D activities or from other activities

E.g. new uses or combinations of existing tech, new business models, new ways of interacting with users

Oslo Manual (OECD/Eurostat)

= the implementation of a new or significantly improved product (good or service), or process, a new marketing method, or a new organizational method in business practices, workplace organization or external relations

Open innovation (H. Chesbrough)

= based on transferring knowledge, expertise and even resources from one company or research institution to another. This assumes that firms can and should use external ideas as well as internal ideas, and internal and external paths to market, as they seek to improve their performance



Innovation

Definitions (2)

Social innovation

= developing new ideas, services and models to better address social issues. It invites input from public and private actors, including civil society, to improve social services

Disruptive innovation (Investopedia)

= any innovative concept, product and service that create new markets by applying new sets of rules, values and models which ultimately disrupt and/or overtake existing markets by displacing earlier technologies and alliances

Breakthrough innovation

= innovations that create new markets with radically new products, services or business models. They typically originate from startups



Innovation Ecosystem

Article 2(47) HE Regulation

'Innovation ecosystem' means an ecosystem that brings together at Union level actors or entities whose functional goal is to enable technology development and innovation; it encompasses relations between material resources (such as funds, equipment, and facilities), institutional entities (such as higher education institutions and support services, research and technology organisations, companies, venture capitalists and financial intermediaries) and national, regional and local policy-making and funding entities.

[Europe's innovation ecosystem survey report](#)



Exploitation = Use of results

Use of the results in further research and innovation activities other than those covered by the action concerned, including among other things, commercial exploitation such as developing, creating, manufacturing and marketing a product or process, creating and providing a service, or in standardisation activities.



This is a legal obligation coming from the Grant Agreement you sign as a beneficiary – *do you know its name and validity period?*

Results lead to impact

- **Art 39**
- Beneficiaries which have received funding under the grant must —up to four years after the end of the action — use their **best efforts** to exploit their results directly or to have them exploited indirectly by another entity, in particular through transfer or licensing.
- Beneficiaries shall disseminate their results as soon as it is feasible, in a publicly available format, [...].

Results

Any tangible or intangible output of the action, such as data, knowledge and information whatever their form or nature, whether or not they can be protected.*

Project results can be reusable and exploitable (e.g. inventions, prototypes, services) as such, or elements (knowledge, technology, processes, networks) that have potential to contribute for further work on research or innovation

Key exploitable results are the outputs generated during the project which can be used and create impact, either by the project partners or by other stakeholders

* http://ec.europa.eu/research/participants/portal/desktop/en/support/reference_terms.html





Innovation routes

Section 1.1

Objectives and Ambition

Describe **how your project goes beyond the state-of-the-art**, and the extent the proposed work is ambitious. Indicate any **exceptional ground-breaking R&I, novel concepts and approaches, new products, services or business and organisational models**. Where relevant, illustrate the **advance by referring to products and services already available on the market**. Refer to any patent or publication search carried out.

Describe **where the proposed work is positioned in terms of R&I maturity** (i.e. where it is situated in the spectrum from 'idea to application', or from 'lab to market'). Where applicable, provide an indication of the **Technology Readiness Level, if possible distinguishing the start and by the end of the project**.

Please bear in mind that advances beyond the state of the art must be interpreted in the light of the positioning of the project. Expectations will not be the same for RIAs at lower TRL, compared with Innovation Actions at high TRLs.



Evaluating the potential

Technology and Market assessment

Assessment of the foreground IP

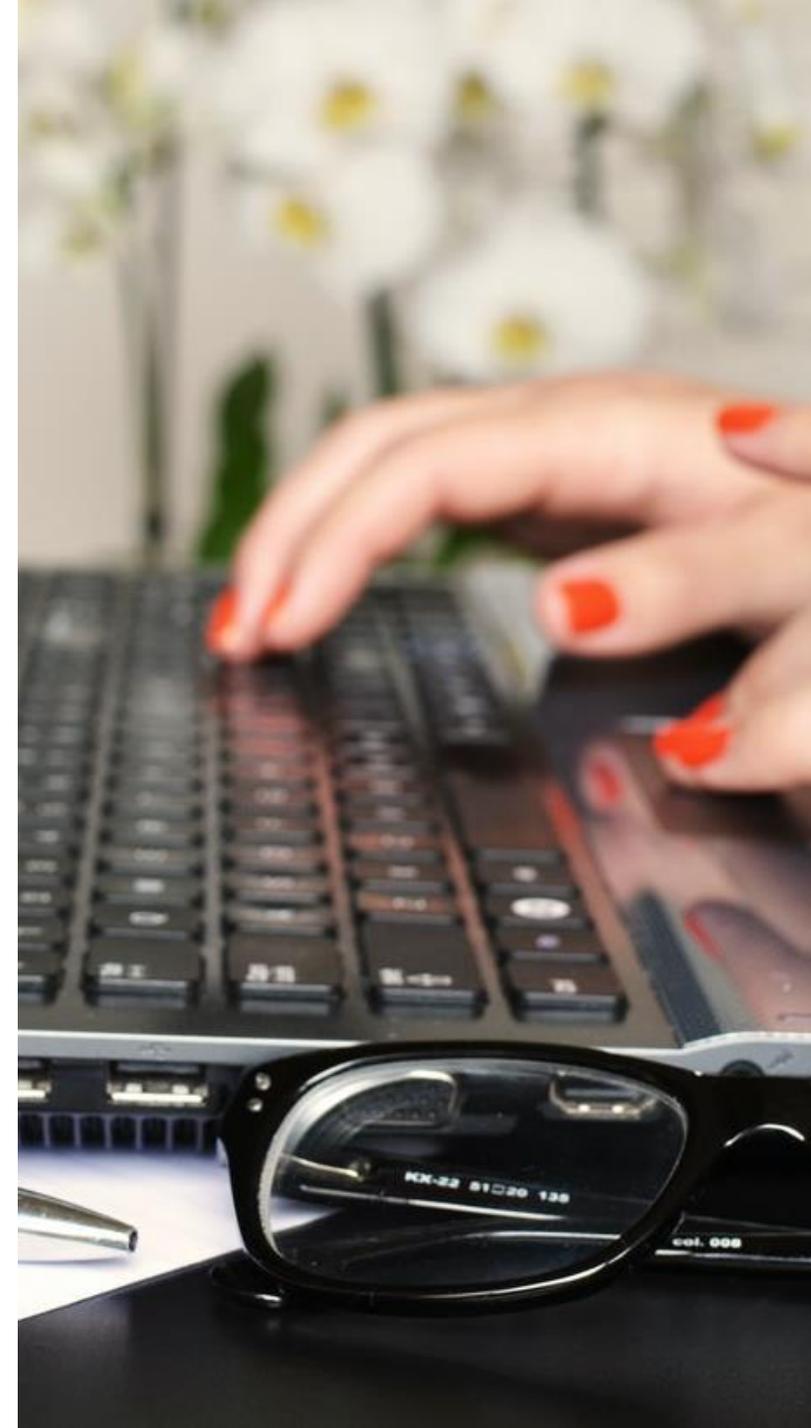
- Prior search for patentability
- Search in patents (Espacenet; European Patent Register - Alert)
- Search for trademarks and design (EUIPO eSearch Plus)
- Search in standards (CEN-CENELEC)

Market analysis

- Technical reports
- Company websites, annual reports (incl. financial)
- Market reports
- Industry partners

Competitor/Technology analysis

- Market size, segmentation, growth potential
- Market share, competitors' current and future plans
- Other technical solutions
- Potential barriers and obstacles

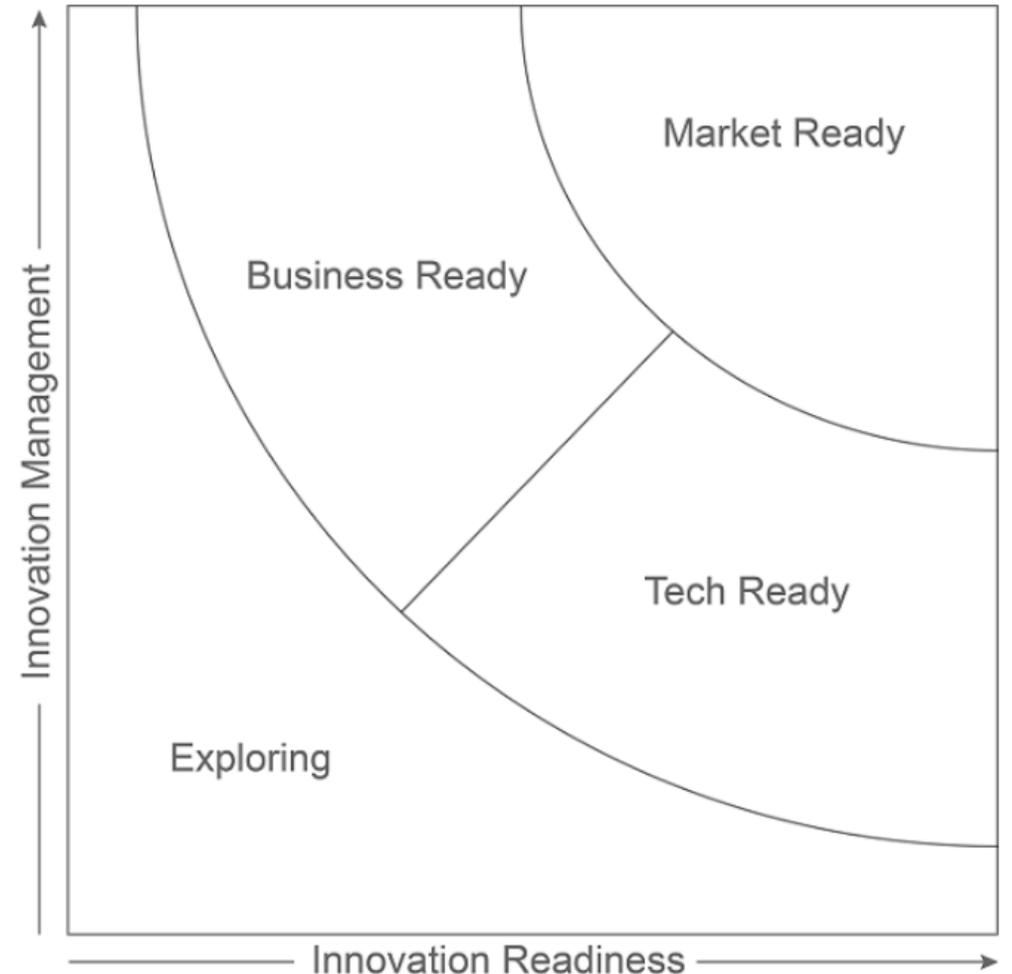


Innovation radar

- 4 maturity levels of innovations
 - Exploring
 - Business Ready
 - Tech Ready
 - Market Ready
- Each category represents approximately 50 percent (Exploring), 20 percent (Business ready), 20 percent (Tech Ready) and 10 percent (Market Ready) of the innovations.
- <https://www.innoradar.eu/methodology>

Market Creation Potential Indicator

- The MCPI was developed in 2020 by the European Commission's Joint Research Centre (for more details see their [June 2020 paper describing the MCPI](#)).



Social innovation

European Commission publication [Social innovation: inspirational practices supporting people throughout their lives \(2020\)](#)

Social innovations are new ideas that meet social needs, create social relationships and form new collaborations. These innovations can be products, services or models addressing unmet needs more effectively. They contribute to bring forward new responses to pressing social demands to improve human well-being.

Social Innovation Academy

- **In practice**, social innovations take form of social enterprises, corporate innovation projects, non-profits, public sector programs, grass-root movements or community initiatives.
- <https://www.socialinnovationacademy.eu/about-social-innovation-academy/>
- 8 H2020 projects supporting social innovation <https://www.socialinnovationacademy.eu/social-innovation-europe-8-inspiring-projects-funded-eus-research-programme/>





TRL and SRL

Technology Readiness Level

- TRL 1 –basic principles observed
- TRL 2 –technology concept formulated
- TRL 3 –experimental proof of concept
- TRL4 –technology validated in lab
- TRL 5 –technology validated in relevant environment (industrially relevant environment in the case of key enabling technologies)
- TRL 6 –technology demonstrated in relevant environment (industrially relevant environment in the case of key enabling technologies)
- TRL 7 –system prototype demonstration in operational environment
- TRL 8 –system complete and qualified
- TRL 9 –actual system proven in operational environment (competitive manufacturing in the case of key enabling technologies; or in space)

Societal Readiness Level (SRL)

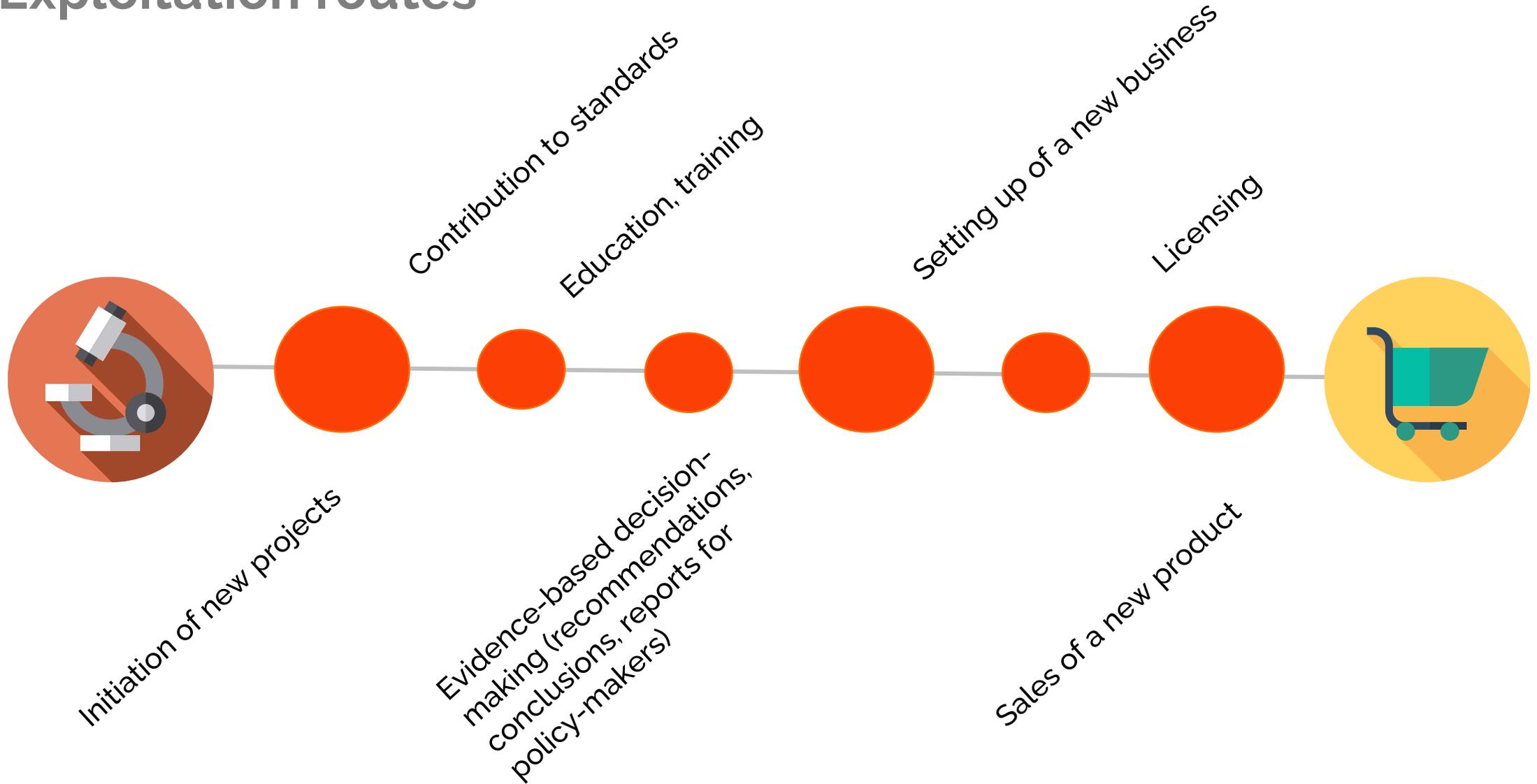
- SRL1 – identifying problem and identifying societal readiness
- SRL2 – formulation of problem, proposed solution(s) and potential impact, expected societal readiness; identifying relevant stakeholders for the project.
- SRL3 – initial testing of proposed solution(s) together with relevant stakeholders
- SRL4 – problem validated through pilot testing in relevant environment to substantiate proposed impact and societal readiness
- SRL5 – proposed solution(s) validated, now by relevant stakeholders in the area
- SRL6 – solution(s) demonstrated in relevant environment and in co-operation with relevant stakeholders to gain initial feedback on potential impact
- SRL7 – refinement of project and/or solution and, if needed, retesting in relevant environment with relevant stakeholders
- SRL8 – proposed solution(s) as well as a plan for societal adaptation complete and qualified
- SRL9 – actual project solution(s) proven in relevant environment



Exploitation routes

Section 2.2

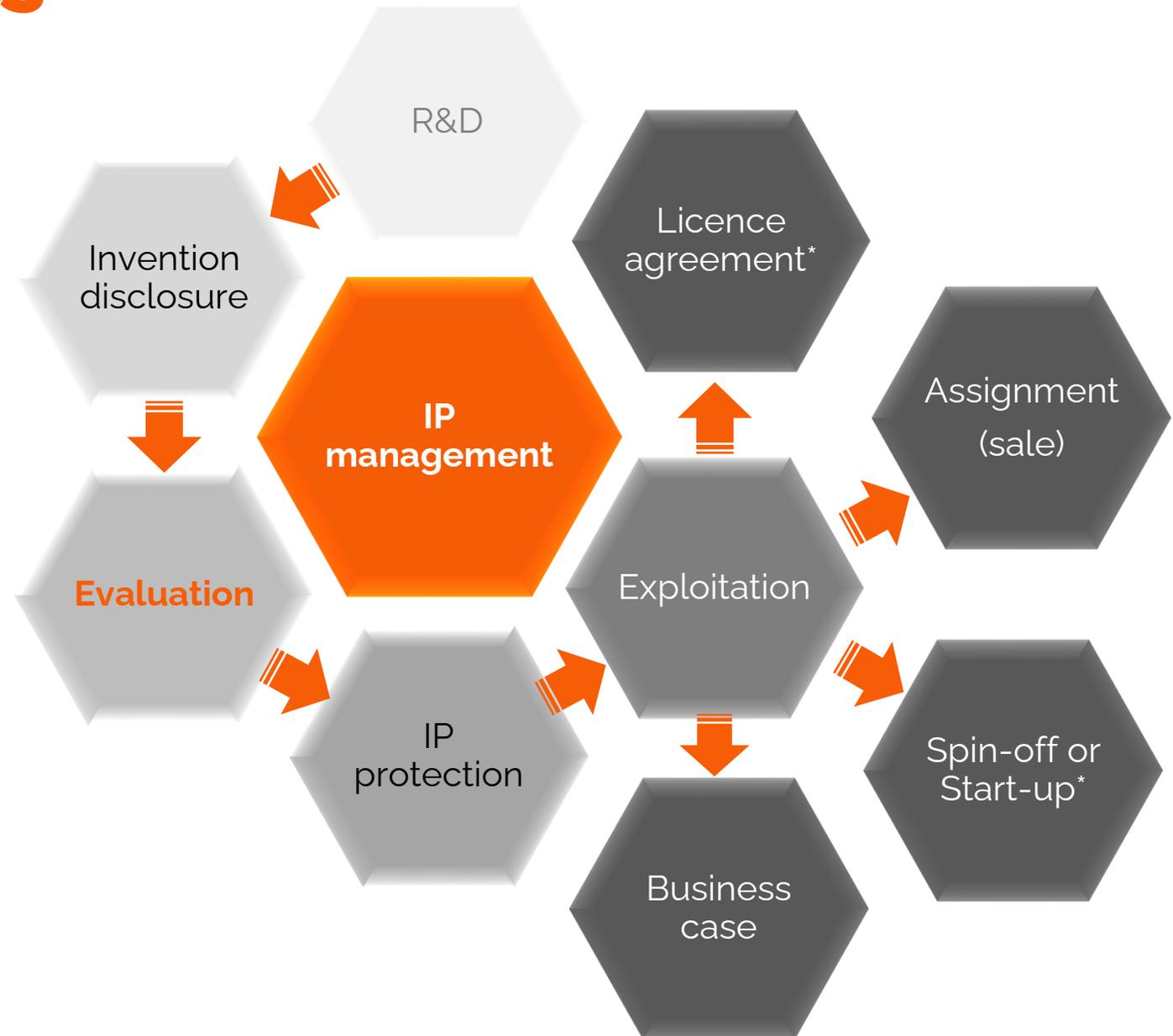
Exploitation routes



Exploitation routes

Organisational level

- Decide on how to commercialise your IP:
 - By its IP owner
 - Through assignments
 - By business partners (e.g. licencing, Joint venture and spin-offs)



Innovation Management

- Understanding the **market needs** and opportunities.
- Being responsible for the overall **strategic approach**.
- Mapping innovation potential - **capture ideas and results**.
- **Evaluating the IP** of project results.
- Continually **monitoring the market**, IP and technology landscapes.
- **Steering the development plan** to meet the project objectives and market needs.
- **Ensuring that the project's foundations** and management processes and structures for innovation **are sound** and working effectively, **innovation capacity** is fully used.



The Commission defines innovation management as:

*The overall management of all activities related to **understanding needs**, with the objective of successfully **identifying new ideas**, and managing them, **in order to develop new products and services which satisfy these needs**. Innovation management starts at the point of **capturing the creative works** and finishes when **a product or service is deployed**.*

Summary: What's new in D&E under HE?

Changes from H2020

D&E is part of the Key Impact Pathway to demonstrate the contribution to the impact on society

Improvements on the proposal/reporting template to introduce more specific language on D&E

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

Encouragement of third-party exploitation (where appropriate)

Introduction of incentives for exploitation



Capacity

Ecosystem embeddedness

Innovation indicator

- Extent to which the development and commercialisation of an innovation is embedded in a community of organisations and individuals who can affect or are affected by the innovation, such as suppliers, customers, and other stakeholders
- Refers to how the consortium understands itself as part of a system of multilateral actors that need to co-operate



Ecosystem groups:

- a) market-related
- b) Supplier-related
- c) Science-related
- d) Wider ecosystem

Assess innovation capacity

- **Organisational innovation capacity** refers to a single organisation's capability to produce and exploit new products, services, systems or processes over periods of time.
- For a H2020/HEU **project** consider the capacity on consortium level to:
 - use multiple external sources besides the internally available to drive innovation;
 - learn and use scientific, technological or other knowledge that exists outside of the project BUT capture also all internally developed ideas in the project
 - exploit, transform and commercialise the results/knowledge generated
 - create strong connections and cultivate co-operative connections

EC Tools

To boost Dissemination and Exploitation

Horizon Results Booster

Dissemination & Exploitation – Business Planning – Go to Market

<https://www.horizonresultsbooster.eu/>

Horizon IP Scan

Helping SMEs manage and valorise Intellectual Property (IP) in R&I collaborations.

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

European IP Helpdesk

A first-line IP service providing free-of-charge support to help European SMEs and beneficiaries of EU-funded research projects manage their IP

https://intellectual-property-helpdesk.ec.europa.eu/regional-helpdesks/european-ip-helpdesk_en

Innovation Radar

Discover cutting-edge EU-funded innovations being developed by Europe's leading researchers and innovators

<https://www.innoradar.eu/>

Horizon Results Platform

To promote your Key Exploitable Results

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



Tips

To do list?

TO DO

- Quantitative **indicators** with **credible justification** – that your project will generate the necessary outputs and outcomes and the innovation will be responding to specific **end-user/societal needs**
- Specific **tasks and structures** for Innovation Management (incl exploitation and IPR management)
- Measures to enhance **wider uptake of results** – „useful innovations”
- Extrapolation of impact to **EU/global level (EIC)**
- **Sustainability** considerations
- Consideration of the **innovation ecosystems**



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Thank
you

for your attention

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