How to write successful proposals under Horizon Europe: Project Management, Communication, Dissemination and Exploitation Work Packages

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- > 15 years experience in Framework programmes
- > 10 active participations in FP6, FP7 and H2020
- National Contact Point and Programme Committee member in FP7 and H2020
- European Commission expert for three years consequently (Southeast Asia and Africa)
- Co-author of two brochures on Horizon 2020 programme (2015)
- Author of the book „Horizon Europe 2021-2027 Next Generation of Research and Innovation“ (2021)
- Author of the brochure „Horizon Europe – A brief guide for NCPs“ (2022)
- Founder of EURAXESS Bosnia and Herzegovina and EURAXESS Africa
Content

- Dissemination, Exploitation and Communication
  - Dissemination plan
  - Exploitation plan
  - Communication plan

- Project management
  - Roles of the Co-ordinator and partners
  - Meetings
  - Reporting
INTRODUCTION
WP’s interdependencies

Dissemination/Exploitation/Communication

Project Management

WP 1

WP 2

WP 3

WP 4

WP 5

WP 6

R&I WP

R&I WP

R&I WP

R&I WP

R&I WP
DISSEMINATION, EXPLOITATION AND COMMUNICATION (DEC)

https://biz.libretexts.org/Bookshelves/Management/Principles_of_Management_(OpenStax)/16%3A_Managerial_Communication/16.01%3A_The_Process_of_Managerial_Communication
Logic behind the DEC* plans

1. **Results and science relevant messages**
   - Dissemination
     - Results dissemination to peers

2. **Exploitation plan**
   - Exploitation
     - Commercialisation

3. **Key messages and audience**
   - Communication
     - Raising interest and engagement

*DEC – Dissemination Exploitation Communication*
Dissemination: Make your results public

Target group
Primary: Scientists/Researchers
Secondary (can learn from): authorities, industry, policymakers, sectors of interest, civil society

Means for achievement
Publishing in: Scientific magazines, Scientific and/or targeted conferences, Databases

Timing
At any time, as soon as the results are created

Objectives
To maximise impact of the results
To allow other researchers to go a step forward based on your achievements
Contribute to the advancement of the state of the art in domain
To make scientific results a common good
To implement Open Science principles
**Exploitation: Make concrete use of results**

**Target group**
Primary: Scientists/Researchers
Secondary (can make good use of): authorities, industry, policymakers, sectors of interest, civil society

**Means for achievement**
Producing: Roadmaps, prototypes, software
Sharing: knowledge, skills, data

**Timing**
Towards the end and beyond, as soon as the action has exploitable results

**Objectives**
To initiate changes with new legislation or recommendations
To make a benefit of innovation, the economy and the society
Help to tackle a problem and respond to an existing demand
To protect IPR and facilitate commercialisation
Communication: Promote your action and results

<table>
<thead>
<tr>
<th>Target group</th>
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<tbody>
<tr>
<td>Broader audience: researchers, authorities, industry, policymakers, sectors of interest, civil society</td>
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<table>
<thead>
<tr>
<th>Means for achievement</th>
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<tbody>
<tr>
<td>Produce: A well-designed strategy and campaigns</td>
</tr>
<tr>
<td>Conveying: clear messages to target groups</td>
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<tr>
<td>Using: the right media channels</td>
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<table>
<thead>
<tr>
<th>Timing</th>
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<tr>
<td>From start to the end of the project, continuous</td>
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<table>
<thead>
<tr>
<th>Objectives</th>
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<tr>
<td>To engage with stakeholders</td>
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<tr>
<td>To attract the attention of best experts, even to include them in team</td>
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<tr>
<td>To generate market demand for your results</td>
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<tr>
<td>To raise awareness of how public money is spent</td>
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<tr>
<td>To show the importance and success of collaborative work</td>
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EU tools for DEC*

Research and Innovation success stories (DEC)
The most recent success stories from EU-funded R&I.

CORDIS (DEC)
Multilingual articles and publications that highlight research results, based on an open repository of EU project information.

Horizon Dashboard (DE)
An intuitive and interactive knowledge platform to extract statistics and data on EU Research and Innovation programmes.

Horizon Results Booster (DE)
Free of charge to benefit from following services:
1. Portfolio Dissemination & Exploitation Strategy
2. Business plan development

Horizon Magazine (C)
The latest news and features about thought-provoking R&I research projects funded by the EU.

Horizon Impact Award (C)
An annual prize to recognise and celebrate outstanding projects that have used their results to provide value for society. The award showcases best practices and achievements and inspire beneficiaries to maximise the impact of their research!

Innovation Radar (DE)
A data-driven method focused on the identification of high potential innovations and the key innovators behind them in EU-funded R&I projects.

Horizon Results Platform (europa.eu)(DE)
A public platform that promotes research results and widening exploitation opportunities. It helps to bridge the gap between research results and generating value for economy and society. You can create your own page to showcase your results, find collaboration opportunities and get inspired by the results of others!

*DEC – Dissemination Exploitation Communication
How to plan DEC* WP?

WP objectives must be clear, feasible and focused on DEC*

DEC* plans must be present in submission stage, but can and should be updated along the project lifetime

Define messages for target groups in advance

Plan stakeholders engagement and networking

Show links to previous projects/initiatives of importance and link with consortium, if possible

Task leader, Contributors, Timeline, Deliverables aligned to each task clearly!

Pay attention to „Restricted“ deliverables in DEC*

*DEC – Dissemination Exploitation Communication
# Example of DEC

<table>
<thead>
<tr>
<th>Target group</th>
<th>Message</th>
<th>Level (D/E/C)</th>
<th>Relevant to WP</th>
<th>Who?</th>
<th>When?</th>
<th>Channel and frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>General public</td>
<td>Promotion of the project beginning – message: join us for more information</td>
<td>C</td>
<td>WP5 DEC</td>
<td>All</td>
<td>M3</td>
<td>Website monthly Social media (min. 48 posts on FB and 48 posts on LI)</td>
</tr>
<tr>
<td>Peers</td>
<td>Important result in diabetes 1</td>
<td>D</td>
<td>WP2</td>
<td>WP Lead + Contributors</td>
<td>M24</td>
<td>Conference „???” 1 paper presented</td>
</tr>
<tr>
<td>Public health authorities</td>
<td>Implement e-health tools for better Quality of Service</td>
<td>E</td>
<td>WP4</td>
<td>All</td>
<td>M18</td>
<td>White paper on use of e-tools</td>
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<tr>
<td>...</td>
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...
Roles of coordinator and partners

**Beneficiary**
- Signs the project
- Has all rights and obligations

**Associated partner**
- Does work but can NOT declare costs

**Subcontractor**
- Does work and invoices the beneficiary
- The beneficiary may declare the invoice

**Affiliated entity**
- With a legal or capital link with the beneficiary
- Does work and may declare costs

**Third party providing contributions**
- Does NOT do work just give in-kind contributions
- The beneficiary may declare the costs of the contributions

**Experience in project management**

**Research excellence in domain**

**Coordinator (EU MS / AC)**

**European Commission / REA**

**Consortium**
- Partner1 (MS/AC)
- Partner2 (MS/AC)
- Partner n

DESCRIBE ROLES AND COMPLEMENTARITY OF PARTICIPATING INSTITUTIONS!
Groups

- Project management team
- Advisory board
- Monitoring team
- Secondments managers
- Task forces

Describe roles, responsibilities and decision making process!
Meetings – important tool

- Kick-off meeting
- Annual coordination meetings
- WP specific meetings
- Task force meetings

Project initiation

WP relevant planning, implementing and reporting meetings

Project monitoring and follow-up
Annual planning
Other issues

Task relevant planning, implementing and reporting meetings

PROVIDE FULL DETAILS ON MEETINGS!
How to plan Project management WP?

**WP objectives** must be clear, feasible and focused on implementation

Make sure that the *workflows are coherent* and no redundancy

Task leader, Contributors, Timeline, Deliverables **aligned to each task** clearly!

Ensure **realistic work load and deadlines** for each task

Show **awareness on risks** influencing implementation, but don’t exaggerate

Provide realistic and convincing **corrective measures**

**It is all about managing resources** – time, people and budget!

*Be precise! Don’t leave evaluators in doubt!*
Reporting

Obligation by GA

Reporting per reporting period

Technical and Financial reporting

Clearly defined process

Deliverables to be reported in time

Any deviation must be foreseen and discussed with PO

Beneficiary

Prepares the report(s)

Reports to

Payment

Reports to

Co-ordinator

Prepares the report(s)
Aggregates the reports

Reports to

Project officer

Analyses the reports
Approve the reports

MENTION REPORTING OBLIGATIONS!
Good project management practice

- Experienced coordinator is a key of success!
- Organise regular management meetings to control the implementation
- Align DEC plans fully with the project impact!
- Ensure complementarity of partners to prevent conflict and misunderstanding.
- Load distribution is important to keep consortium collaborating
- Responsiveness timely is crucial for the team work
- Everyone should be motivated to achieve objectives – different motivations incl.
- COMMITMENT OF ALL PARTNERS to reach objectives!
## Don’t and do’es

<table>
<thead>
<tr>
<th>Don’t</th>
<th>Do</th>
<th>Be</th>
</tr>
</thead>
<tbody>
<tr>
<td>copy-paste a project management section from an old proposal (or other proposal).</td>
<td>describe all your management groups/roles and why are they important.</td>
<td>Punctual, Precise, Clear and Comprehensive, Ambitious but Realistic</td>
</tr>
<tr>
<td>copy-paste a DEC section from an old proposal (or other proposal).</td>
<td>Cross-check to ensure consistency.</td>
<td></td>
</tr>
<tr>
<td>make a strategy and structure that is generic and not tailored to your unique project.</td>
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THANK YOU FOR YOUR ATTENTION!!!

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