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# D1.2 CALL TOOLKIT

**META Group**

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# Executive Summary

This document presents the Deliverable 1.2 *Call toolkit* of the widerAdvance project.

The goal of this deliverable is to describe the main instruments and tools for an effective management of the open call, as part of T1.2 *Design and management of the open calls* in Work Package 1 (WP1).

The document includes all the steps involved and all supporting documents elaborated to guide the implementation and successful launch of the Open Call. The Call toolkit is structured as follows:

- The **Call text** (see section 3) describing the Open Call details, including the eligibility criteria, the application procedures, and priorities for selection of applicants.
- The **Application form** (see section 4) for the submission of applications including the Guide for Applicants, providing guidelines on how to submit applications.
- The **Guide for selection** (see section 5) providing instructions to Key Account Managers (KAM) to assess and select beneficiaries for the different services.

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## List of Acronyms

AB	Advisory Board
BuildERS	Building European Communities Resilience and Social Capital project
D	Deliverable
D&E	Dissemination and Exploitation
DoA	Description of Action
GA	Grant Agreement
HE	Horizon Europe
IP	Intellectual Property
KAM	Key Account Manager
KER	Key Exploitable Result
MEP	Member of European Parliament
ML	Mutual Learning
NCP	National Contact Point
RMA	Research & Administration Management
RT	Research Team
SDP	Service Delivery Plan
TRL	Technology Readiness Level
TTO	Technology Transfer Office
WP	Work Package

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# 1. Objectives

The primary objective of the Deliverable D1.2 – *Call toolkit* is to outline the detailed instruments and tools developed for the management and implementation of the open call, ensuring clarity, transparency, and alignment with the overall objectives of the widerAdvance Facility.

Within this framework, the document elaborates on several key elements developed under Task 1.2. These elements were designed as a reference document to guide potential applicants, evaluators, and project partners through a transparent and efficient open call process.

D1.2 contains the following main documents:

- **Call text:** it aims to clearly explain to potential applicants the rules for participation to the Open Call, the modalities for the submission of the applications, the eligibility conditions, the priorities for selection at each cut-off date and the steps after the submission of the applications. This guiding text was published on the widerAdvance website the day that the Open Call was launched 28/05/2025 (<https://www.wideradvance.eu/service/open-call>).
- **Application form with guide for applicants:** it is designed to collect, in a standardised format, all the necessary information that applicants are required to provide to access the individualized services of the Facility as well as other opportunities such as the coaching for synergies, the matchmaking events, etc. The tool embeds specific instruction for applicants on how to fill it in the application form.
- **Guide for Selection:** it provides instructions, in particular for Key Account Managers (KAMs), regarding the eligibility/selection criteria to access the different services made available by the Facility.

## 2. Methodology and approach

### 2.1. Ease of use and clarity

When developing the call toolkit, the main priority in the approach has been the **ease of use**, which has not been simply a consideration, but a central pillar in the development of all application-related materials. Great care has been taken to ensure that every document and tool is intuitive, and minimises unnecessary complexity. The application form, in particular, has been designed to be as streamlined and user-friendly as possible, requesting only the essential information to lower entry barriers for applicants across varying levels of experience and capacity. To further simplify the experience, the Guide for Applicants has been integrated directly into the application form, enabling applicants to receive real-time guidance at every stage of the process. This choice not only has enhanced the clarity and usability of the system but also embodies one of the central values of the widerAdvance Facility: the active removal of unnecessary complexity as a means to empower broad and inclusive participation.

### 2.2. Integration of digital tools

To streamline processes and enhance data collection and management, several tools have been directly integrated into the widerAdvance Facility platform. This digital integration allows for the automation of various procedures and facilitates a more efficient workflow for both applicants and administrators.

In particular, the Exploitation Intentions Table, which forms part of the official Call Text, is available online in the Open Call section of the Facility's official website. Prospective applicants can download this table in advance to prepare themselves effectively. Furthermore, once the cut-off date has passed, those invited to provide additional information will have access to a dedicated version of the table within the platform, which can be completed and submitted directly online. Similarly, the Application Form is fully accessible and manageable online through the Facility's platform. Applicants can easily register and submit their proposals by clicking the 'Apply' button available on the official website.

Both the Application Form and the Exploitation Intentions Table are exclusively managed through the online system, ensuring a transparent, user-friendly, and paperless application process.

### 2.3. Flexible approach

The approach combines a standardised framework that ensures consistency across all materials and procedures with a high degree of flexibility. This flexibility represents a fundamental principle in the implementation of the Facility. This flexibility enables the Facility to adjust its targets over time by setting specific priorities for the selection of applicants at each cut-off date. These priorities are defined through discussion and consensus within the Call Committee and serve as a strategic tool to secure wider impact. They may be revised from one cut-off to another to better reflect evolving needs and opportunities. Such flexibility allows the Facility to react promptly and purposefully to shifting conditions by, for example, balancing the geographical presence of selected beneficiaries across the Widening Countries, focusing on KERs stemming from specific types of Widening Actions, or responding to newly emerging policy directions. In this way, the Facility remains a dynamic and adaptive mechanism, ensuring that its support remains relevant, inclusive, and strategically aligned with its mission to foster innovation-driven impact throughout the eligible regions.

## 2.4. Previous experiences

The methodological foundations of the Facility are deeply rooted in the extensive experience acquired by the consortium through previous EU-funded initiatives. Drawing on successful practices and lessons learned from projects such as Horizon Results Booster, HSbooster.eu, and IP Booster, the widerAdvance Facility has been designed to reflect a robust and tested framework. These initiatives provided not only methodological insights but also operational experience in supporting research valorisation, innovation exploitation, and strategic stakeholder engagement. The Facility is conceived not simply as a support mechanism but as a comprehensive and adaptive learning environment for researchers, research management entities, and technology transfer professionals. It builds upon and aligns with established European Commission frameworks and tools, ensuring coherence and complementarity. The methodological approach adopted is, therefore, both grounded in proven practice and forward-looking, with the capacity to be scaled or replicated by other institutions or regional actors.

## 2.5. Collaborative approach

The design and implementation of the Call Toolkit followed a structured, collaborative, and iterative approach. Specifically, Task 1.2, under which the Call Toolkit was developed, involved the active contribution of all partners participating in Work Package 1. Collaboration was carried out consistently through a series of regular meetings where partners jointly discussed the development of the documents, shared feedback, and proposed revisions. All materials were reviewed collectively, ensuring that the Call Toolkit reflected a shared and agreed vision of the WP1 contributors. Furthermore, all documents were formally discussed and approved by the Call Committee, which includes the WP leaders and the representative for the Outermost Regions (RUI), ensuring transparency and alignment with the overall governance structure of the Facility.

### 3. Call text

The Open Call text consolidates the information for potential applicants wishing to apply to the Facility. It has been carefully drafted to serve as the official reference for the Open Call and is published on the Facility's website.

This text could be reviewed and updated by the Call Committee ahead of each cut-off date to ensure applicants receive accurate and timely information relevant to each specific submission deadline.

The Call text is available on the official widerAdvance Facility website under the "Open Call" section, accessible via the following link <https://www.wideradvance.eu/service/open-call>.

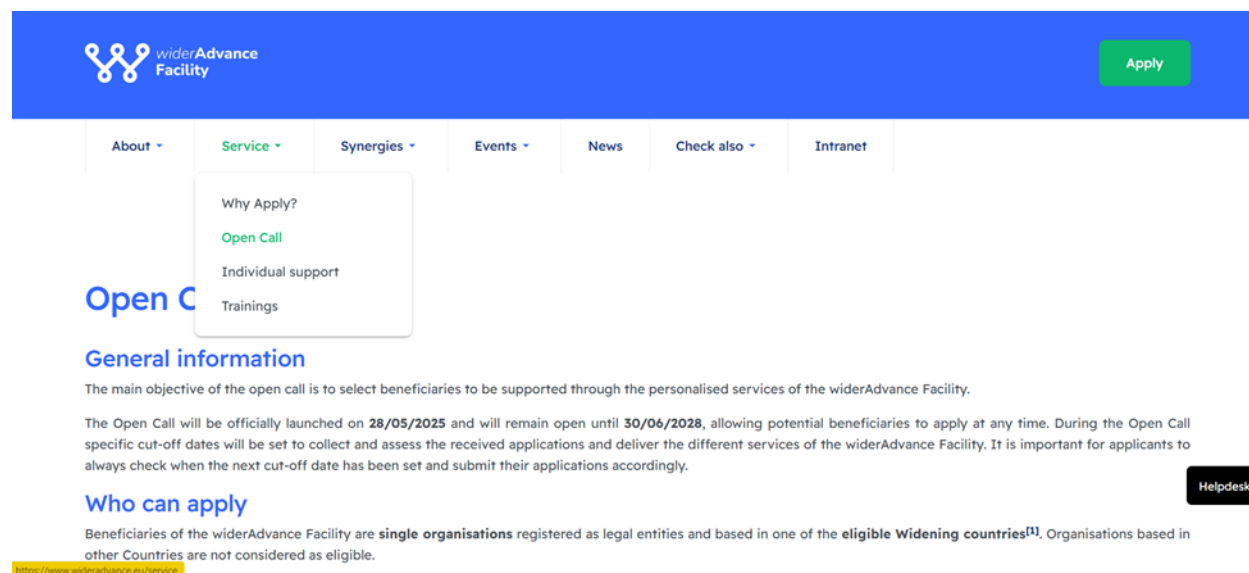


FIGURE 1: OPEN CALL SECTION

The following paragraphs describe the different sections of the Call text approved at the time of the submission of the present document. Modifications and/or updates on the call text might happen during the period of the Facility.

#### 3.1. General information

The main objective of the open call is to select beneficiaries to be supported through the personalised services of the widerAdvance Facility, which grant also access to other opportunities such as the matchmaking events, the training webinars, the coaching on synergies, etc.

The Open Call was officially launched on **28/05/2025** and will remain open until **30/06/2028**, allowing potential beneficiaries to apply at any time. During the Open Call specific cut-off dates will be set to collect and assess the received applications and deliver the different services of the widerAdvance Facility. It is important for applicants to always check when the next cut-off date has been set and submit their applications accordingly.

## 3.2. Who can apply

Beneficiaries of the Open Call are **single organisations** registered as legal entities and based in one of the **eligible Widening countries**<sup>1</sup>. Organisations based in other Countries are not considered as eligible.

IMPORTANT: particular priorities on eligible applicants may be determined during the Open Call and modified at each cut-off date. Applicants are strongly recommended to always check actual priorities at a specific cut-off date.

## 3.3. Who/What will receive support

The services of the widerAdvance Facility focus on building capacities of Research Teams (RTs) and Research & Administration Management (RMAs) of applicant organisations. In particular, supported RTs have to be responsible for the valorisation of Key Exploitable Results (KER) stemming directly or indirectly from **Widening actions** (ongoing or closed).

In this context, the following definitions apply:

- **KER**: is a significant output, innovation, or technological/scientific advancement developed by beneficiaries of Widening actions under Horizon 2020 and Horizon Europe, either directly through the widening action or indirectly within its thematic context. These results should have substantial potential for practical application and exploitation. KERs encompass a broad range of results, including technological advancements and research findings, that can lead to tangible benefits and improvements, including institutional changes. In the Widening context, KERs may also include broader impacts such as enhancements in institutional capacities, policy developments, and systemic changes that facilitate the uptake and application of research results.
- **Widening action**<sup>2</sup> : projects funded under: COST Actions; ERA Chairs; ERA Talents; Excellence Hubs; European Excellence Initiative; Hop-on facility; Pathways to synergies; Teaming for Excellence (Phase 2 in Horizon 2020); Teaming for **Excellence (Stage-2** in Horizon Europe); Twinning; Twinning for Western Balkans; Widening/ERA Fellowship (H2020/HE).
- **Direct KER**: is a KER generated directly through the implementation of the activities funded under a Widening action.
- **Indirect KER**: are produced as a follow up of a previous Widening action, even if they are generated from a different funding programme. They are generally in the same research

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<sup>1</sup> **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.

<sup>2</sup> **Horizon Europe WIDERA Work Programme**: [https://rea.ec.europa.eu/funding-and-grants/horizon-europe-widening-participation-and-spreading-excellence\\_en](https://rea.ec.europa.eu/funding-and-grants/horizon-europe-widening-participation-and-spreading-excellence_en); **Horizon 2020**: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/calls-for-proposals?isExactMatch=true&status=31094501,31094502,31094503&programmePeriod=2014%20-%202020&frameworkProgramme=31045243&programmePart=31048019&order=DESC&pageNumber=1&pageSize=50&sortBy=startDate> **COST Programme**: <https://www.cost.eu>

domain as the original Widening action. For example, if a university is a beneficiary of Twinning in applied linguistics, they can apply to the Facility with KERs from other projects on applied linguistics, but not from quantum physics.

### 3.4. Priorities for the next cut-off date

The first **3 cut-off dates** are set at:

- **31/07/2025, h23.59CET** (first cut-off date).
- **31/10/2025 h23.59CET** (second cut-off date).
- **31/01/2026 h23.59CET** (third cut-off date).

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 section [What happens after the submission](#)).
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.

### 3.5. How to submit applications

Applications must be submitted exclusively online, using the dedicated application form available here: <https://platform.wideradvance.eu>

Applications must be submitted in English.

Applications submitted after a given cut-off date, might be subject to different priorities, as specified in the Call text.

In case of technical problems with the submission of applications, please write to: [contact@wideradvance.eu](mailto:contact@wideradvance.eu)

Application presented with different modalities than those described here will be rejected.

To speed up the preparation of applications, we recommend applicants to scout in advance the following information within their organisations:

- Widening actions in which the organisation was involved as coordinator or beneficiary.
- KERs originating from such Widening actions.
- Other follow up research activities originating from widening actions.
- KERs originating from such follow up research activities.
- RTs involved in/responsible for the KERs originating from Widening actions and follow up research activities.
- RMAs willing to build capacities and improve skills on specific Dissemination&Exploitation topics.

Applicants are strongly recommended to involve RTs and RMAs within their organisations in this scouting action to collect the necessary information.

There is not any specific limit to the number of KERs, RTs and RMAs that can be listed in the application form. However, not all proposed KERs, RTs and RMAs will be selected for the widerAdvance Facility.

### 3.6. What happens after the submission

At each cut-off date, all received applications will be evaluated against eligibility criteria and specific priorities.

Due to organisational issues and based on the number of received applications, an upper limit to the number of selected beneficiaries may be set.

Applicants that are not selected at a specific cut-off date, will be automatically considered at the next cut-off date.

Applicants not matching eligibility criteria will not be considered for further assessment.

All applicants will receive feedback on their applications within 10 days after each cut-off date.

Applicants matching eligibility criteria will be contacted to provide additional information about the KERs listed in the application form. This information will be used to better assess validity and maturity of the proposed KERs.

Selected applicants will be expected to allocate the necessary personnel to work in close coordination with the experts in implementing the proposed activities, and to actively participate in the events organised by the widerAdvance Facility.

For more information of the widerAdvance Facility services click [here](#).



## 4. Application form with guide for applicants

The application form has been designed specifically to collect the data required for the initial evaluation of applications, thereby simplifying the process for the end users (the Facility applicants). The primary objective was to create an application procedure and form that are as user-friendly, intuitive, and easy to navigate as possible.

To maximise ease of use, the application process is conducted entirely online via the following direct link: <https://platform.wideradvance.eu/apply>

This link is also conveniently accessible to applicants by clicking the “Apply” button on the homepage of the official website.

Furthermore, to facilitate the completion of the application form, the Guide for Applicants has been integrated directly within the form itself, providing step-by-step assistance to applicants when they have to provide the required information.

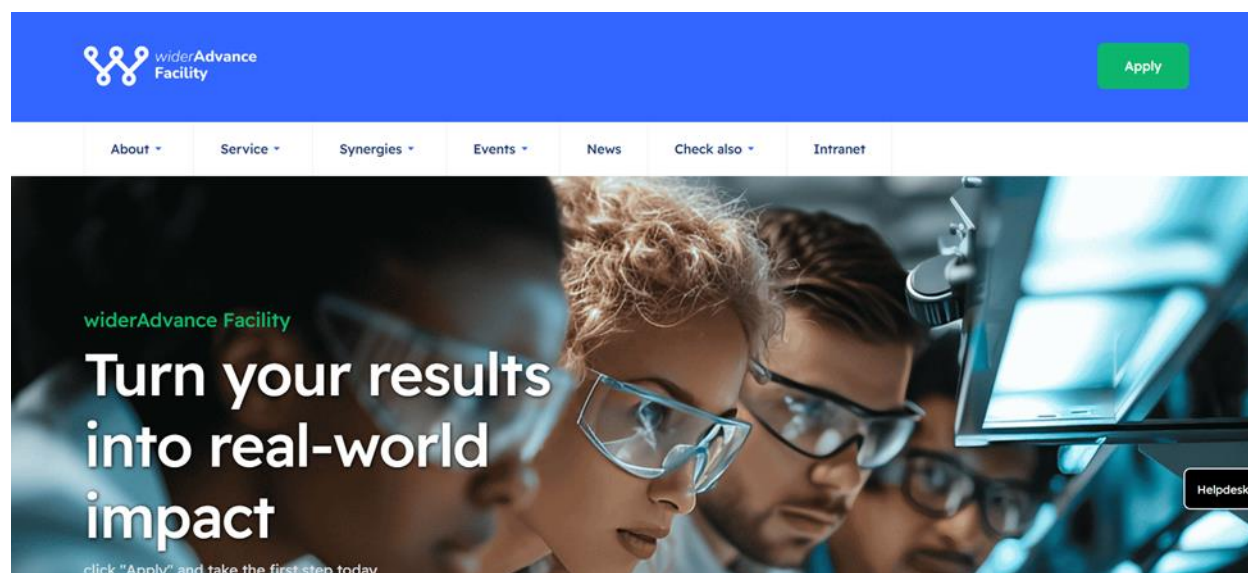


FIGURE 2: THE WIDERADVANCE FACILITY WEBSITE HOME PAGE WITH THE "APPLY" BUTTON

The application form is composed by 3 main sections and a brief introduction that explains to the applicant what information they will need to provide, along with general guidance.

When applicant fill in the different fields and sections of the form, the provided data are saved automatically as they progress.

Once all sections have been completed, applicants can click the “Submit” button to officially send their application.

A confirmation message is displayed on-screen, and a confirmation email is also be sent from [contact@wideradvance.eu](mailto:contact@wideradvance.eu) to acknowledge receipt of the application.

The following paragraphs replicate the Introduction and the 3 main sections of the application form, as it is available on the platform.

## 4.1. Introduction

Welcome! You have to fill in the following sections to complete your application:

- **Section 1 - General information**
- **Section 2 – Key Exploitable Results (KERs)**
- **Section 3 - Research Management & Administration (RMA)**

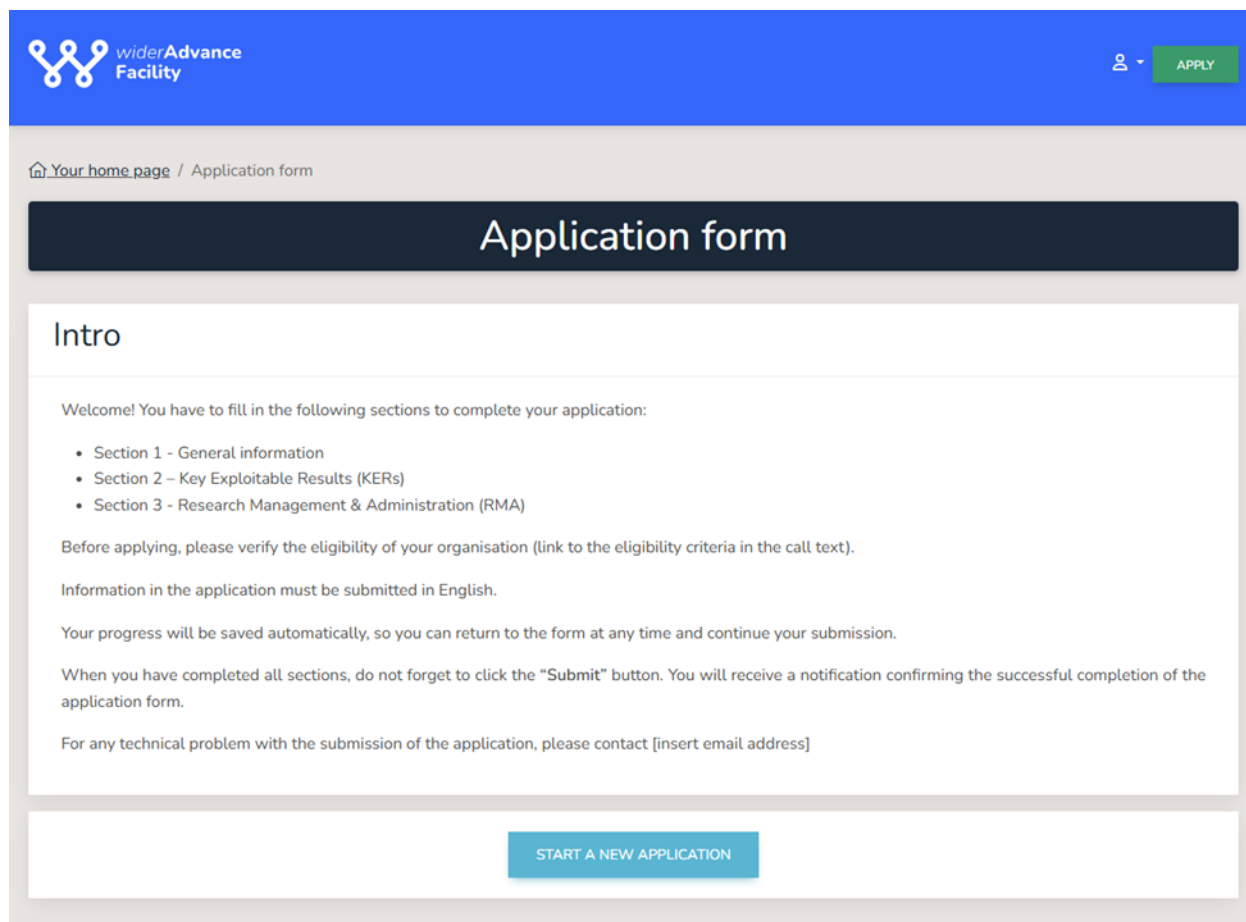
Before applying, please verify the eligibility of your organisation [here](#).

Information in the application must be submitted in English.

Your progress will be saved automatically, so you can return to the form at any time and continue your submission.

When you have completed all sections, do not forget to click the “**Submit**” button. You will receive a notification confirming the successful completion of the application form.

For any technical problem with the submission of the application, please contact [contact@wideradvance.eu](mailto:contact@wideradvance.eu)



The screenshot shows the 'Application form' intro page of the widerAdvance Facility. The page has a blue header with the logo and an 'APPLY' button. Below the header, there is a breadcrumb trail: 'Your home page / Application form'. The main title 'Application form' is displayed in a dark blue box. The 'Intro' section contains the following text:

Welcome! You have to fill in the following sections to complete your application:

- Section 1 - General information
- Section 2 – Key Exploitable Results (KERs)
- Section 3 - Research Management & Administration (RMA)

Before applying, please verify the eligibility of your organisation (link to the eligibility criteria in the call text).

Information in the application must be submitted in English.

Your progress will be saved automatically, so you can return to the form at any time and continue your submission.

When you have completed all sections, do not forget to click the “Submit” button. You will receive a notification confirming the successful completion of the application form.

For any technical problem with the submission of the application, please contact [insert email address]

At the bottom of the page, there is a button labeled 'START A NEW APPLICATION'.

FIGURE 3: INTRO OF THE APPLICATION FORM

## 4.2. Section 1 – General information

Applicants can be only organisations registered as legal entities:

### Your organisation:

- **PIC number:** Enter the PIC number of the legal entity for which you are submitting the application.

[blank space] (optional)

- **Full name:** Enter the full legal name of the legal entity for which you are submitting the application.

[blank space]

- **Country or Region:** Select from the list.

[Albania; Armenia; Açores; Bosnia and Herzegovina; Bulgaria; Canarias; Croatia; Cyprus; Czech Republic; Estonia; Faroe Islands; Georgia; Greece; Guadeloupe; Guyane; Hungary; Kosovo; La Réunion; Latvia; Lithuania; Madeira; Malta; Martinique; Mayotte; Moldova; Montenegro; North Macedonia; Poland; Portugal; Romania; Saint-Martin; Serbia; Slovakia; Slovenia; Tunisia; Turkey; Ukraine]

- **Website:** Enter the URL of your organisation's official website.

[blank space]


### Contact person(s):

Contact persons are contacted after the submission of the application to provide additional information before entering the services of the widerAdvance Facility. They will be also the main reference point for the organisation during the delivery of the services.

- **First name:** [blank space]
- **Last name:** [blank space]
- **E-mail address:** [blank space]
- **Phone number:** [blank space] (optional)

**“Add person”**

Click here to add another contact person You can add up to **1** additional contact person.

 Please click this button to submit your application
 SUBMIT

SECTION 1 - GENERAL INFORMATION
SECTION 2 - KEY EXPLOITABLE RESULTS
SECTION 3 - RESEARCH MANAGEMENT & ADMINISTRATION (RMA)

### Section 1 – General information

*Applicants can be only organisations registered as legal entities:*

**PIC**  
Enter the PIC of the legal entity for which you are submitting the application

**Full name**  
Enter the full legal name of the legal entity for which you are submitting the application

**Country or Region**  
Select from the list. Only eligible countries or regions are listed.

**Project website**  
Enter the URL of your organisation's official website

**Contact person(s)**  
Contact persons are contacted after the submission of the application to provide additional information before entering the services of the widerAdvance Facility. They will be also the main reference point for the organisation during the delivery of the services.

First name	Lastname	Email address	Phone number	Role
<div style="display: flex; align-items: center; justify-content: center; margin-bottom: 10px;"> <span style="background-color: #00AEEF; color: white; padding: 2px 10px; border-radius: 5px; cursor: pointer; margin-right: 10px;">+ ADD PERSON</span> <span>Click here to add another contact person You can add up to 1 additional contact person.</span> </div>				

FIGURE 4: SECTION 1 - GENERAL INFORMATION

## 4.3. Section 2 – Key Exploitable Results

Please provide the list of the **Key Exploitable Results (KERs)**, which you would like to support through the widerAdvance Facility. Please note that for each KER you will have to specify:

- A contact person of the Research Team responsible for the development of the KER.
- The link of the KER with a Widening action of your organisation.

### KER1

- **KER Title:** [blank space]
- **Brief Description:** describe what the KER is [blank space max 300 characters]
- **Contact Person of the Research Team:**
  - **First name:** [blank space]
  - **Last name:** [blank space]
  - **E-mail address:** [blank space]

- **Related Widening Action:** please provide the title, the GA number, the link to the website and select the right Widening action related to the KER:
  - Title: [blank space] (at least one of the three)
  - GA number: [blank space] (at least one of the three)
  - Link to the website: [blank space] (at least one of the three)
  - Related Widening action: select from the list

[COST Actions; ERA Chairs; ERA Talents; Excellence Hubs; European Excellence Initiative; Hop On Facility; Pathways to Synergies; Teaming for Excellence (Phase 2 in Horizon 2020); Teaming for Excellence (Stage-2 in Horizon Europe); Twinning; Twinning for Western Balkans; Widening/ERA Fellowship (H2020/HE)]

- **Link with the Widening Action:** specify how the KERs originates from the given Widening Action. Select from the list:

[Directly generated within the Widening action; From a follow up research project of the previous Widening action; From knowledge/experience obtained in the previous Widening action; From activities in the same domain of the previous widening action; + other (please specify)]

- **Current TRL (if applicable):** Specify the current estimated Technology Readiness Level (TRL) of the KER. Select from the list:

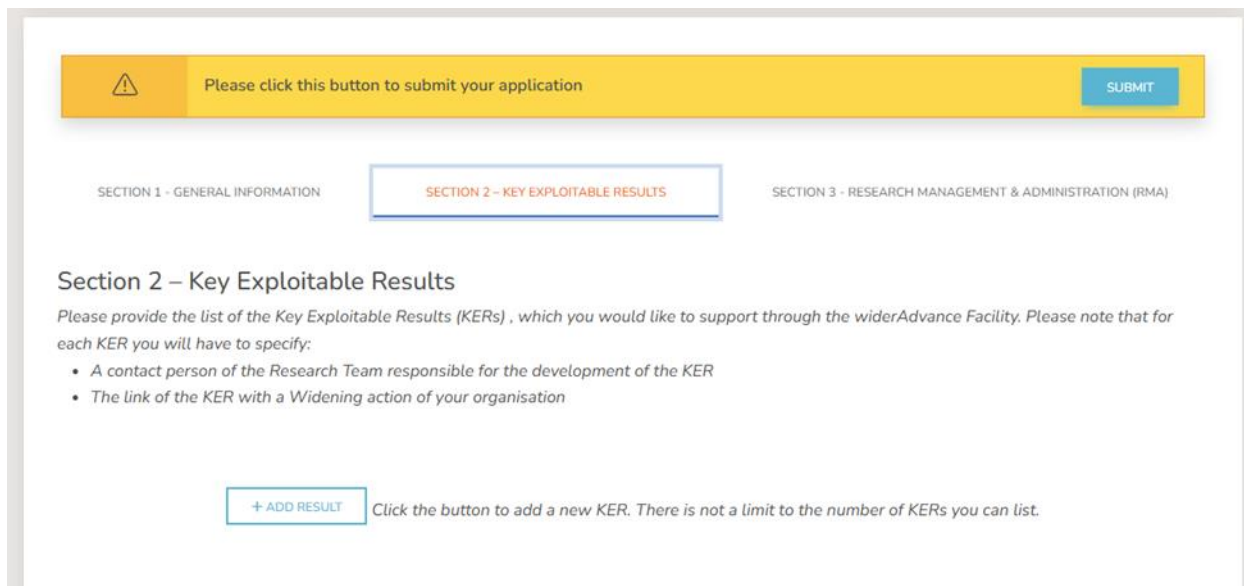
[Not applicable; TRL1; TRL2; TRL3; TRL4; TRL5; TRL6; TRL7; TRL8; TRL9]

- **Thematic field:** Specify the primary thematic field of the KER. Select from the list:

[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 + other (please specify)]

### **“Add result”**

Click the button to add a new KER. There is not a limit to the number of KERs you can list.



The screenshot shows the 'widerAdvance Facility' application form. At the top, a yellow banner contains a warning icon and the text 'Please click this button to submit your application', with a 'SUBMIT' button on the right. Below the banner, three section tabs are visible: 'SECTION 1 - GENERAL INFORMATION', 'SECTION 2 - KEY EXPLOITABLE RESULTS' (which is highlighted with a blue border), and 'SECTION 3 - RESEARCH MANAGEMENT & ADMINISTRATION (RMA)'. The 'Section 2 - Key Exploitable Results' section contains the following text: 'Please provide the list of the Key Exploitable Results (KERs) , which you would like to support through the widerAdvance Facility. Please note that for each KER you will have to specify:'. This is followed by a bulleted list: '• A contact person of the Research Team responsible for the development of the KER' and '• The link of the KER with a Widening action of your organisation'. At the bottom of the section, there is a '+ ADD RESULT' button and a note: 'Click the button to add a new KER. There is not a limit to the number of KERs you can list.'

FIGURE 5: SECTION 2 - KEY EXPLOITABLE RESULTS


## 4.4. Section 3 – Research Management & Administration (RMA)

WiderAdvance Facility is designed to support also staff of the Research Management & Administration of your organisation. RMAs could be staff from Industrial Liaison Offices, Intellectual Property (IP) Offices, Technology Transfer Offices, European Project offices, Knowledge Valorisation Offices, etc.

Please provide contacts of the person which will be required to provide further details on RMAs to be supported at a later stage. It is suggested that this person has general knowledge of the RMAs within your organisation. Please note that this person does not replace the main contact person(s) indicated in Section 1.

Contact for Research Management & Administration (RMA)

- **First name:** [blank space]
- **Last name:** [blank space]
- **E-mail address:** [blank space]

 Please click this button to submit your application

SECTION 1 - GENERAL INFORMATION      SECTION 2 - KEY EXPLOITABLE RESULTS      **SECTION 3 - RESEARCH MANAGEMENT & ADMINISTRATION (RMA)**

### Section 3 - Research Management & Administration (RMA)

*WiderAdvance Facility is designed to support also staff of the Research Management & Administration of your organisation. RMAs could be staff from Industrial Liaison Offices, Intellectual Property (IP) Offices, Technology Transfer Offices, European Project offices, Knowledge Valorisation Offices, etc. Please provide contacts of the person which will be required to provide further details on RMAs to be supported at a later stage. It is suggested that this person has general knowledge of the RMAs within your organisation. Please note that this person does not replace the main contact person(s) indicated in Section 1.*

First name

Last name

E-mail address

FIGURE 6: SECTION 3 - RESEARCH MANAGEMENT & ADMINISTRATION (RMA)

Please click this button to submit your application.

**“Submit”**

By submitting this application, you confirm that you understand and consent to the processing of your data in accordance with GDPR regulations. For further details, please refer to <https://www.wideradvance.eu/privacy-policy>

## 4.5. Message after sending the application

Your application has been successfully submitted. You will receive a confirmation email shortly.

In case your application is selected, you and the contact persons specified in the application will be contacted by our staff for the next steps.

## 5. Guide for selection

The Guide for Selection outlines the process of the identification and selection of beneficiaries for the different services under the WiderAdvance Facility. In particular, it is a key instrument for the Key Account Managers (KAMs) and the experts who intervene in the assessment process of applicants.

The Guide for Selection provide details for the evaluation of eligibility and selection criteria, including specific access criteria for each different service of the Facility, ensuring a transparent, consistent, and standard approach.

### 5.1. General information

Almost all beneficiaries of the widerAdvance Facility's services are selected through a structured procedure. Therefore, potential beneficiaries have to follow such procedures and are assessed against specific criteria.

The present document provides guidelines to those that are involved in the selection of beneficiaries for the different services.

#### 5.1.1. When selection is needed

The widerAdvance Facility includes several typologies of services, which can be summarized in the following groups:

- Individual services. This includes 4 different services which target specific KERs proposed by RTs. Beneficiaries of the individual services are selected through the use of a specific online application form.
- Awareness raising and capacity building online sessions, which are collective sessions aiming at the general improvement of skills and knowledge of RTs and RMAs on exploitation and dissemination. Participants to such sessions are selected through a specific online registration form or by the experts providing the individual services.
- Capacity building events. They primarily aim at networking for participation in competitive calls and matchmaking with third parties, providing to RTs and RMAs concrete opportunities for exploitation and dissemination. Participants to such events are selected by the experts providing the individual services.
- Study visits: Aimed at facilitating peer-learning and enhance networking opportunities for RMAs, especially those involved in knowledge valorisation, through visits to research-based organisations in widening countries.
- Support on synergies, focuses on improvement of capacities of RTs and RMAs to make use of different funding opportunities at national and international level, including ERDF, for the purpose of further valorisation of the KER. Beneficiaries of this support are selected by the experts of the individual services.

#### 5.1.2. Key Account Manager (KAM)

A Key Account Manager (KAM) is an expert who will have the main role of assessing the applications received and proposing to the applicants tailored services, based on their needs.

More in particular, the KAM will be particularly involved in the selection of beneficiaries for the individual services and will have the main responsibility of:



- Checking the consistency of Key Exploitable Results proposed by the applicants.
- Quickly assess the maturity level of the KERs based on their use/adoption readiness level.
- Preparing and updating the Service Delivery Plan (SDP) for each applicant, specifying which services each RT and RMA is suggested to benefit from.
- Check improvements made by RTs and RMAs to allow access to other services.

Experts acting as KAMs, will have to match the following profile:

- Excellent understanding of the definition of a KER.
- Previous experiences in assessing use/adoption readiness level.
- Previous experiences in supporting exploitation/dissemination of KERs.

The number of KAMs involved depends on the number of applications to be assessed. It is assumed that one KAM can manage the assessment of up to 10 applications as a maximum.

### **5.1.3. Effective use of resources**

The widerAdvance Facility is a 4 years-long project. Therefore, services should be delivered throughout such period in the most homogeneous way possible.

Moreover, the number of resources made available by the partners of the widerAdvance Facility in specific periods could be limited.

Due to these two elements, there is a need to allocate resources effectively during this 4 years period.

This implies that the number of applicants selected for each service has an upper limit, which should be taken into account in case of a high number of applications received. As an example, considering that it is expected to deliver 50 editions of the D&E Academy in total, a homogeneous distribution of such editions throughout 12 cut off dates implies the organisation of 4-5 editions at each cut-off date. Since each edition has a maximum number of participants of 15 RTs, the KAMs should select an adequate number of applicants that allows to match such limits.

Moreover, KAM is required to assess applications against specific priorities, which are designed to support the strategic objectives of the widerAdvance Facility. Priorities may vary across cut-off dates. Before proceeding with the selection assessment, KAM must consult and verify the priorities and selection limits applicable to the specific cut-off date under evaluation.

The applicable upper limit, along with the corresponding selection priorities, is always outlined in the Operational Manual of Tools and Procedures, which is regularly updated.

## **5.2. Selection procedure for individual services**

Beneficiaries of the individual services are selected through an open call which includes several cut off dates (at the moment 12 cut-off dates are foreseen). Potential beneficiaries can apply to the individual services by submitting an online application form. The KAMs are the experts appointed for the assessment of the applications and selection of beneficiaries.

### **5.2.1. Eligibility check**

All applications submitted to the widerAdvance Facility are collected through the official widerAdvance platform. At each cut-off date the KAMs will have to access the platform to start the assessment of the

collected applications. Each submitted application form can be visualized by the KAMs directly on the platform or can be downloaded in pdf format for offline visualization.

The first assessment made by KAMs is related to the eligibility of applications.

This involves verifying whether the applicant meets the general eligibility criteria set by the widerAdvance Facility. The following conditions must be satisfied:

- The application must be submitted by an organisation (applications submitted by individuals are not eligible).
- The applicant must be legally established in one of the eligible Widening Countries.
- They must demonstrate a direct or indirect link to a Horizon 2020 or Horizon Europe Widening action. This includes participation in open or closed actions such as COST Actions; ERA Chairs; ERA Talents; Excellence Hubs; European Excellence Initiative; Hop-on facility; Pathways to synergies; Teaming for Excellence (Phase 2 in Horizon 2020); Teaming for Excellence (Stage-2 in Horizon Europe); Twinning; Twinning for Western Balkans; Widening/ERA Fellowship (H2020/HE).

Such criteria are verified through the submitted application forms as follows:

- The application form requires as a mandatory information to specify the beneficiary organisation by providing its PIC (used in other EU projects) or its complete details (denomination, address, etc.). If the PIC is provided, the widerAdvance platform automatically checks the legal status of the organisation. Otherwise, the KAM should check on the web the existence of the organisation.
- The application form requires as a mandatory information the Country of origin of the organisation. Only eligible Countries and regions can be specified. Therefore, organisations from non-eligible Countries/regions cannot submit an application.
- The application form requires to specify for each listed KER the link (direct or indirect) to a funded Widening action (by specifying the Grant Agreement number, the title of the project or the project website). The KAM should verify as a first step if the proposed KERs are consistent with the specified Widening action. Confirmation of such linked will be provided during the initial contacts with the applicants.

Once the KAMs checked the eligibility of applicants, the eligibility check, they have to approve or reject the application on the platform within **10 working days** from the cut-off date.

Applicants will receive a notification from the platform about approval or rejection and, just in case, instructions for the next steps.

### 5.2.2. Prioritization of applicants

After verification of the eligibility of applicants, KAMs should use the procedure for their selection and prepare a final ranked list, by considering the priorities, if applicable, set for the concerned cut-off date.

KAMs can verify the priorities applicable to a specific cut-off date in the Operational Manual of Tools and Procedures. However, such priorities will be also communicated to the KAMs by the Call Committee, whenever a modification is done.

In addition, the KAMs should verify with the Call Committee the actual capacity for delivering the services by checking available resources. In particular, the KAMs should define the number of the different services that can be activated at each cut-off date.

Based on that, KAMs will be able to decide how many applicants can be selected at a specific cut-off date.

Applicants that are not prioritized at a specific cut-off date, will remain eligible and will be considered at the next available cut-off date.

As a general benchmark, the selection limit should be coherent with the launch of maximum five editions of the D&E Academy (unless otherwise specified in the Operational Manual).

### 5.2.3. Selection procedure

#### 5.2.3.1. Initial contact and first assessment

Within the **2 working days** after the application approval, the KAM sends an email to the contact person(s) indicated in the application form to:

- Agree on the date for the Initial Engagement Meeting (see paragraph 2.5), which should take place within **14 calendar days**.
- Ask them to fill in the **Exploitation Intentions Table** for each KER listed in the application form and upload them in the platform within **10 calendar days**. In the email the KAM suggests to directly involve the RTs responsible for the KERs: they are the best positioned to provide the information required by the Exploitation Intentions Table. This tool will allow KAMs to:
  - Decide about the final list of KERs to be supported (excluding those that are not consistent or do not match the definition of KER).
  - Have an initial idea of the maturity of KERs (which could be one of the criteria for prioritization of the applicants) measured through their “Adoption Readiness Level”.
  - Propose the best services to be activated.

Once the completed Exploitation Intentions Tables are received back, the KAM conducts an initial assessment within the following **4 working days** (before the Initial Engagement Meeting).

This methodology to assess consistency of the KERs and their Adoption Readiness Level is part of the background knowledge of one of the widerAdvance Facility’s partners (META Group) and is subject to confidentiality. Therefore, it will not be described in the present deliverable, but it will be shared with the KAMs.

During the assessment of the Exploitation Intentions Table, some KERs may deserve further analysis to decide about direct access to specialised support services such as [Support with Intangible Assets](#) and [Support with Standardisation](#). In this case, further self-assessment questionnaires have to be prepared as well as an in-depth interview with the target RTs.

#### 5.2.3.2. The Initial Engagement Meeting and the second level assessment

The Initial Engagement Meeting takes place online on the date agreed previously with the applicant. The most common web-meeting tools (MS Teams, Zoom, etc.) can be used, based on the preferences of the applicant.

This meeting lasts around 1 hour and is used by KAMs to present to the applicants and discuss with them the results of the initial assessment.

In particular, the KAM explains the final selection of the KERs that could be supported and presents to the applicant the potential Service Delivery Plan (SDP), specifying the different services for the target RTs and RMAs.

Even if the SDP is prepared for each applicant, this does not constitute a condition for their selection for the WiderAdvance individual services. KAMs must always verify priorities set for that specific cut-off date and resources available.

Once all Initial Engagement Meetings have been delivered, applicants are officially informed about their selection.

Applicants that are not selected, will be considered automatically in the assessment process of the next cut-off date.

#### **5.2.3.3. Self-Assessment Questionnaire and in-depth interview**

In the case of KERs that need further assessment, during the initial engagement meeting KAMs share with the applicants a self-assessment questionnaire, which must be returned within 4 calendar days and agree with them on a date for an in-depth interview. It is strongly recommended that the RTs directly involved in the relevant sector of the KER(s) contribute actively to the completion of the questionnaire(s), to ensure an accurate and meaningful assessment.

The self-assessment questionnaires are shared with the experts that would deliver the specific service. They will also participate to the in-depth interview to discuss the answers provided in the questionnaire and evaluate readiness to directly access the specific services. After the in-depth interview, the experts and the KAM decide about the inclusion of the specific services in the SDP.

The templates for the self-assessment questionnaires are part of the background knowledge of some partners of the widerAdvance Facility (Trust-IT and UNICO) and cannot be made public in the present deliverable. They will be made available to the KAMs and the experts during the project.

#### **5.2.3.4. Service Delivery Plan (SDP)**

The SDP outlines the set of services to be activated for an applicant. In particular, each RT and RMA will be proposed to receive support by the Facility with the most appropriate service, such as the individual services, the awareness raising webinars, the training webinars, the networking events, the study visits, the coaching on synergies, etc.

The SDP outlines also a structured timeline for the implementation of the proposed services. It is important to consider that RMAs could also be suggested to participate to activities primarily targeting RTs, as a learning experience, to become familiar with methodologies, tools and best practices in dissemination and exploitation.

SDPs are always communicated by KAMs to the applicant, including the involved RTs and RMAs, which should provide formal acceptance (or rejection) of the plan within **one week**.

The SDP for selected applicants can be updated or modified by the KAM in case particular conditions occur such as in the case of KERs that required the in-depth assessment for direct access to specific services.

Moreover, at the conclusion of services of the SDP, the KAM evaluates the progress and improvements made by RTs and RMAs and, where appropriate, may propose to RTs and RMAs access to additional services of the widerAdvance Facility, in line with their evolving needs and demonstrated readiness.

### 5.3. Criteria to access individual services

This section describes the specific criteria used by KAMs to propose the individual services of the Facility to the applicants.

#### 5.3.1. D&E Academy

The D&E Academy is designed to support RTs in preparing structured dissemination and exploitation strategies for their KERs, including use/business models and action plans/business plans.

KAMs may recommend also RMAs to participate to the D&E Academy as learning experience to improve their capacities and skills in supporting RTs.

Each edition of the Academy supports a maximum of **15 RTs**, representing a **single KER each**.

When proposing the Academy to the applicants, the KAM should consider the following main criteria:

- The KER has been clearly and effectively identified by the RT.
- There is a clearly identified and committed RT responsible for the KER.

Due to the limit for the participants in each edition (15 RTs), the KAM may have to select among a long list of KERs proposed in the application form. In such cases, priority should be given to KERs that demonstrate a higher level of maturity (intended as adoption readiness level).

Moreover, when composing the list of participants to a single edition of the Academy, the KAM should consider the following additional elements:

- The D&E Academy includes the delivery of a physical workshop, for which participants are required to cover expenses related to travels and accommodations, if needed. To facilitate participation, the KAM could compose the list of participants to a D&E Academy by selecting RTs and RMAs from a single organisation, or from organisations based in the same geographical area.
- Facilitate discussion among peers during the collective workshops and addressing common needs/problems applicable to a specific scientific/industrial domain. The KAM may compose the list of participants considering homogeneous scientific/industrial domains of their KERs.
- Facilitate experts in addressing and discussing topics, problems and needs of interest for the majority of participants. The KAM may compose the list of participants considering RTs with a homogeneous level of maturity of their KERs.

When selecting applicants to the D&E Facility, KAMs should consider that during the course of the Facility it is expected to deliver 50 editions of the D&E Academy, with the participation of at least 100 different organisations. Considering a total number of 12 cut-off dates, KAMs should select applicants and RTs in a way to have full audience for **4-5 editions at each cut-off date**. This means an average of at least **2 organisations** in each edition and **60-75 RTs** selected.

The D&E Academy also serves as a preparatory phase to access more specific services. It is therefore important that the KAM receives feedback from the experts delivering the D&E Academy to identify those KERs (and related RTs) that reaches a sufficient level of maturity to access the other specialised services such as support for standardisation, support with intangible assets, or preparation to match with third parties.

### 5.3.2. Support with Intangible Assets

Support with Intangible Assets is designed to support RTs and RMAs (in particular, staff from TTOs or their equivalent) with KERs at a higher maturity level. Each service accommodates a maximum of **3 KERs** for each applicant.

Both groups may access the services. However, TTOs and RTs are suited for the *IP Strategy and Path to Commercialization* service, while the *IP Negotiations* service is likely better suited for RTs. This is because the latter service focuses on a stage of commercialization in which RTs and TTOs have to negotiate the terms of their commercialization and future relationship – changing roles from collaborators to business partners following slightly different interests.

To ensure efficient and effective delivery of this service, KAM should consider the following criteria when proposing it to applicants:

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

KAMs can provide access to this service through 2 main pathways:

- Previous support to the KERs through the D&E Academy and specific recommendation from the experts delivering the Academy.
- Direct access, after passing the [in-depth assessment](#).

Whatever the pathway is, before accessing this service the target RTs and/or the RMAs have to fill in the Self-Assessment Questionnaire (also declaring the IP ownership structure) and go through an online in-depth interview with the experts delivering the services.

After the assessment by the relevant IP expert, they recommend the best package among:

- **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.

RTs and/or RMAs with limited or no prior knowledge to IP management may be more appropriately redirected to training and awareness webinars on IP management, where appropriate.

### 5.3.3. Support with Standardisation

The Standardisation 1:1 Consultancy is intended for RTs and RMAs working with KERs at an intermediate to advanced Technology Readiness Level: **TRL 4–9**. Each service targets a single KER for each applicant.

The KAM should propose this service only where there is a clear need for a tailored support such as aligning results with existing standards or navigating domain-specific standards landscapes.



When proposing applicants Support with Standardisation, the following base criteria must be considered:

- Intermediate to advanced level of KERs TRL 4-9.
- Knowledge about standards.

KAMs can provide access to this service through 2 main pathways:

- Previous support to the KERs through the D&E Academy and specific recommendation from the experts delivering the Academy.
- Direct access, after passing the [in-depth assessment](#).

Whatever the pathway is, before accessing this service the target RTs and/or the RMAs have to fill in the Self-Assessment Questionnaire and go through an online in-depth interview with the experts delivering the services.

RTs and/or RMAs with limited or no prior exposure to standardisation may be more appropriately redirected to training and awareness webinars on standardisation, where appropriate.

### 5.3.4. Preparation to Match with Third Parties

The Preparation to Match with Third Parties service is intended for RTs with KERs that demonstrate high level of maturity. Each edition of the service accommodates up to **10 RTs**, with each RT representing one KER.

KAMs may recommend also RMAs to participate to the service as learning experience to improve their capacities and skills in supporting RTs.

KAM should select participants to this service based on the following criteria:

- Successful completion of the D&E Academy.
- Demonstrated progress during the Academy, as confirmed by expert feedback.
- Clear need for engagement with key innovation stakeholders.

Exceptions may be made in specific cases where an RT has not attended the Academy, provided that during the deeper assessment meeting, they clearly demonstrate that:

- A complete business plan has been developed for the proposed KER.
- The RT has already participated in previous pitching or matchmaking sessions (regardless of the outcome).
- A future pitching or matchmaking event is already scheduled.

Moreover, when composing the list of participants to a single edition of this service, the KAM should consider the following additional elements:

- The service includes the delivery of a physical workshop, for which participants are required to cover expenses related to travels and accommodation, if needed. To facilitate participation, the KAM could compose the list of participants by selecting RTs and RMAs from organisations based in the same geographical area where the physical workshop takes place (in most of cases, the location will be the same of a matchmaking event/Open Day).

- RTs targeting innovation stakeholders from homogeneous scientific/industrial domains.

Successful completion of this service is a prerequisite for participation in any matchmaking event organised by the widerAdvance Facility. The structured preparation process is designed to ensure that RTs are equipped with a strong presentation strategy, a clear articulation of the market potential of their KERs, and the skills required to interact effectively with innovation stakeholders.

## **5.4. Selection procedures for other services**

This section highlights the procedures and the criteria to allow access to the other services of the widerAdvance Facility.

### **5.4.1. Awareness raising and capacity building**

#### **5.4.1.1. Awareness raising webinars**

These webinars are not restricted to any group of beneficiaries. On the contrary, they are open to any stakeholder located in a Widening country interested in finding out more about topics related to dissemination and exploitation.

To participate to such webinars, potential beneficiaries have to complete a registration process through the project's website. The awareness raising webinars will be recorded and be available at the project's website.

#### **5.4.1.2. Training webinars**

These in-depth webinars will be available only to the organisations that are already participating to the individual services of the Facility, following a registration process at the project's website. The training subjects and the dates are indicated in a Training Plan approved by the European Commission and will be repeated at designated intervals.

When preparing the SDP for beneficiaries, the KAM should suggest to RTs and RMAs the participation to specific training webinars, based on their specific needs and the assessment of their application form.

Experts who deliver the individual services may also suggest the KAM to include such webinars in the SDP, in case specific needs will raise during the delivery of the individual services.

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

### **5.4.2. Events**

#### **5.4.2.1. Networking events for participation in competitive calls**

The service Networking events for participation in competitive calls are third party events (also known as brokerage events) to be recommended for KERs that would enhance partnering opportunities for further pre-competitive maturation. Events targeting already more mature solutions can be included in this category of events.

In many cases, a KER holder can additionally participate in pitching sessions already available by those third-party events, to present its project idea. Especially the ones organized by networks of National Contact Points tend to have a favorable number of pitches coming solely from the widening countries.



When proposing applicants the Networking events, the following base criteria must be considered:

- KERs with TRL 3-8.
- Need for a follow up research project and connection with potential partners.

KAMs can provide access to this service through:

- Previous support to the KERs through the D&E Academy and specific recommendation from the experts delivering the Academy.

Indicative examples (to facilitate understanding):

#### **For KERs between TRL 3-8**

- 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/crowdhelixa-2025-event-schedule#Brokerage-events>

#### **For KERs between TRL 5-8**

- All the above plus:
  - “[Leading lights](#)” edition of events, i.e. 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.
- 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 for more information.
- Eligibility of travel grants by the NCP\_WIDERA.NET project.

- Other modalities such as registration fee and other access requirements that may apply case by case.

#### 5.4.2.2. Study visits

Study visits are a unique opportunity to learn about the best practices of a research-based host in fields related to the support in exploitation and dissemination of research results. The widerAdvance Facility will organize in total **4 study visits** in hosting organisations from a Widening country of Horizon Europe.

Location of the study visits will be decided in advance and made available to the KAMs. Each study visit should host up to **20 people**. Participants will have to cover their travel expenses.

Study visits are particularly recommended to the RMA staff in order to increase their capacities to support RTs within their own organization and expand their own collaborative networks. Ideally **1-2 people** from the same organization will be allowed to participate.

Beneficiaries of the individual services will be prioritized for participation in the study visits. Therefore, when KAMs prepare the SDP, they should consider the needs expressed by the listed RMAs and propose participation in a study visit.

When the date for a study visit is approaching, if seats (20 in total) are not filled up, then available seats will be opened to the ecosystem by way of registration through the project's website.

#### 5.4.2.3. Matchmaking and Open Days

This service concerns the organization of dedicated matchmaking events around a group of KERs and their RTs who have successfully completed the Academy or further individual services. The main objective is to bring the KER holders in touch with dedicated stakeholders, including interested investors.

The matchmaking events might be composed of different sessions, each of them with a different objective:

- **Pitching sessions.** They will be always part of the matchmaking events and will be used by selected participants to raise the interest of a more specific audience such as investors and other very targeted stakeholders. Pitching sessions will be reserved exclusively for those RTs that completed the Preparation to Match with Third Parties service. A minimum of 5 RTs will be invited to participate to a pitching session.
- **Speed-date sessions.** They are individual discussion between RTs and various other stakeholders. Participants can check in advance the profiles of the other involved participants and book their individual discussion before the event.
- **Open Days sessions.** They are more general in nature and serve as meeting points for interested stakeholders to stimulate open discussions through keynote speeches, presentations, panel/round table discussions around a particular topic. Such sessions complement the preceding sessions.

When proposing applicants the participation to a matchmaking event, the following base criteria are considered:

- Successful completion of D&E Academy or further individual services.
- Need to get in contact with other stakeholders.

- For the pitching sessions, Successful completion of the Preparation to Match with Third Parties service

Experts delivering the different individual services will recommend to the KAMs the RTs to be invited to the matchmaking events.

The KAM may suggest the participation the matchmaking events also to RMAs as a learning experience.

### 5.4.3. Support on Synergies

#### 5.4.3.1. Coaching on Synergies

Two types of coaching will be provided:

- Group coaching.
- Individual coaching.

The **Group Coaching on Synergies** is part of the Awareness raising and capacity building webinars. To participate to such coaching sessions, potential beneficiaries have to complete a registration process through the project's website. The Group Coaching webinars will be recorded and be available at the project's website. At least one Group Coaching webinar for Widening Country/region will take place. Every webinar will last for an hour.

The **Individual Coaching on Synergies** is intended for RTs that have been selected for an individual service and showed an advanced level of maturity for their KERs.

In particular, the experts delivering the individual services should propose to the KAM those beneficiaries which have a clear need for follow up funding mostly available through nationally managed funds.

Therefore, when proposing applicants for the Individual Coaching on Synergies, the following base criteria must be considered:

- Intermediate to advanced level of maturity of KERs.
- Need of obtaining local fundings in the next future (6 months- 1 year).

KAMs can provide access to this service through 3 main pathways:

- Previous support to the KERs through the D&E Academy and specific recommendation from the experts delivering the Academy.
- Previous support to the KERs through the Support with Intangible Assets and specific recommendation from the experts delivering the service.
- Previous support to the KERs through the Standardisation Support and specific recommendation from the experts delivering the service.
- Direct access, after passing the [in-depth assessment](#), if from a KER with a high maturity the need for local funding arises at the application stage.

#### 5.4.3.2. Mutual Learning on Synergies

The Mutual Learning (ML) on effective D&E practices of project results is a capacity building process, with a focus on improving knowledge on how to leverage additional funds through complementarity of programs (ERDF, HE, RRF etc.).

It is dedicated mainly to RMAs wanting to increase their capacity to support RTs within their organisations and RTs.

The Mutual Learning on synergies will be held as round table sessions back-to-back in **2** of the 4 planned Study Visits. The target audience will (in both cases) be service beneficiaries as well as other organisations (not part of the widerAdvance Facility) from Widening countries and ORs.

This will be achieved through **2** complimentary MLs:

- The first will showcase existing success stories (independent from the widerAdvance Facility).
- The second will showcase success stories from among the academy service beneficiaries recording high-quality performance in securing the additional funding.

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 MEP members of the ITRE committee.

For the Mutual Learning on Synergies, the Study Visits selection procedure applies.

The **2 selected** Study Visits for Mutual Learning on Synergies will be decided in advance and made available to the KAMs.

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