



Info Session on the Horizon Results Booster

Service 3 – Go 2 Market (G2M) Intro and Part II

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Service 3 - G2M, Support Type 4: Business Service

Support Type 4: Business Service

Service Characteristics

- Providing operational support right before entering the market
- Solution at high TRL levels
- Mature Use Model already available
- Advanced KERs developed

Activities included in the service:

- Preparing commercialization plans for already developed and tested products/services with well-designed exploitation strategies
- Assessing feasibility of the business plan to be work on making available a final one
- Creating start-ups/spin-offs with complete business model and commercialization plans

Business Service Tools

4P's Assessment



Business Model Assessment Tool

Assessment dimension	Assessment criteria	Score (0-5)	Comments
1. Management Team	Have all needed profiles for the Management Team been identified? Have the skills and background of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined?		
2. Market	Have all needed profiles for the Management Team been identified? Have the skills and background of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined?		
3. Product/Service	Have all needed profiles for the Management Team been identified? Have the skills and background of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined?		
4. Business Model	Have all needed profiles for the Management Team been identified? Have the skills and background of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined?		
5. Legal/Reg	Have all needed profiles for the Management Team been identified? Have the skills and background of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined?		
6. Planning	Have all needed profiles for the Management Team been identified? Have the skills and background of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined?		
7. Finance	Have all needed profiles for the Management Team been identified? Have the skills and background of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined? Have the roles and responsibilities of the members of the Management Team been clearly defined?		
Total			

5C's

1) Customer Needs	What needs do we seek to satisfy?
2) Company Skills	What special competence do those needs?
3) Competition	Who competes with us?
4) Collaborators	Who should we enlist to motivate them?
5) Context	What cultural, tech and possible?

Commercialization Plan

Objectives

Create a "Commercialization Plan" no larger than 12 pages, and to provide a description of each of the following areas:

Section	Description
A. Vision of the Project, Expected Outcomes, and Impacts	
B. Commercialization Team	
C. Market, Customer, and Competition Analysis	
D. Intellectual Property (IP) Protection	
E. Financial Plan	
F. Production Plan	
G. Revenue Stream	
H. Marketing Plan	

Financial Business Case Assessment Tool

Assessment Dimensions	Assessment Criteria	Score (0-5)	Comments
1. Market & sales Drivers	To be completed by the Beneficiary Which are the market segments identified for your financial market projections? Include market data, estimate size of relevant market. Which is your market share?	To be completed by Experts	
2. Funding	Provide an overview of your sources of funding and how will they be used in the following years. How will you deal with an unexpected events and for how long would you be able to do it?		
3. Financial KPI's	Present some financial projections preferably in the form of a profit & loss statement and a cashflow statement. Provide realistic KPI's that match with the potential of the KPI's. (Examples of relevant KPI's are the growth rate, the gross margin, EBITDA margin, the NPV and the IRR.)		
4. Risks and mitigation	Identify the most relevant risks regarding the GIG strategy, rather than general risks. E.g. dependency, patents, regulations, delays, competitors, laws, and regulations. Define achievable mitigation measures for the risks identified.		

Types of Support under Business Service

G2M Support Type 4

Types of support 4.1	Timing	Activities	Tools
Co-designing a plan for commercial development	1 Month	Assessing the desired strategic positioning of the innovation	<ul style="list-style-type: none"> • 4P assessment tool • HRB platform • Feedback form
		Advising/Supporting the optimization of the positioning strategy	
Types of support 4.2	Timing	Activities	Tools
Feasibility studies to assess potential business plans	3 Weeks	Examining Business Plan consistency	<ul style="list-style-type: none"> • Business Model Assessment Tool • HRB platform • Feedback form
		Examining Feasibility and Profitability	
Types of support 4.3	Timing	Activities	Tools
Support in the creation of spin-offs and start-ups	4 Weeks	Assessing the business proposition plan	<ul style="list-style-type: none"> • Self-assessment questionnaire • Belbin Team Role test • BOSAT self assessment tool • HRB platform • Feedback form
		Supporting Team assessment and internal government definition	
		Assessing legal and regulatory aspects	
		Supporting the management intangible assets	
		Examining legal framework for company establishment	
		Evaluation of environmental, ethics, quality standards	



Service 3 - G2M, Support Type 5: Examining Options for Exploitation

Support Type 5: Examining Options for Exploitation

Service Characteristics

- Support the choice of the right exploitation model for higher impact on markets
- Solution at high TRL levels
- Mature Use Model already available
- Advanced KERs developed

Activities included in the service:

- Assessing Exploitation Route and Commercialization Strategy
- Evaluation of pros/cons of implementation options

Types of support 5	Timing	Activities	Tools
Examining Options for Exploitation	4 Weeks	Assessing the Exploitation and Commercialization strategies	<ul style="list-style-type: none">• KERs Exploitation Form• Exploitation Roadmap Form• Commercialization Plan• HRB platform• Feedback form
		Advising/Supporting the choice of exploitation options	

Examining Options for Exploitation Tools

Commercialization Plan

KER Characterization Form

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The Characterisation table is designed to start the collection of information that will be then reviewed and further integrated during the project life. Partners in charge of the Key Exploitable Result (KER) should fill in the content and discuss it with the ones involved in the finalisation of the KER including the partners that will oversee the testing phase.

KER name	Description
Problem	Describe the problem you are addressing (the problem your potential users have). Potential users are the people, companies, organisations, etc. that you expect will use the result (and generate an impact). They are your "Customers".
Alternative solution	Describe how your "customer" has solved the problem so far.
Unique Selling Point USP - Unique Value Proposition UVP	Describe the competitive advantages, the innovative aspects. What does your solution do better, what are the benefits considering what your user/customer wants, how does your solution solve his/her problem better than alternative solutions, what distinguishes the KER from the competition / current solutions?
Description	Describe in a few lines your result and/or solution (the product, service, process, standard, course, policy recommendation, publication, etc.). Use simple wording, avoid acronyms, make sure you explain how your UVP is delivered.
"Market" - Target market	Describe the market in which your product/service will be used/can "compete", answering the following questions: - What is the target market? - Who are the customer segments?
"Market" - Early Adopters	Early adopters are the "customers" you are willing to address first. They are usually the ones that feel the problem harder than all the others. (they are not the project partners)
"Market" - Competitors	Who are your "competitors" (note: they are the ones offering "alternative solutions")? What are their strengths and weaknesses comparing to you?
Go to Market - Use model	Explain what is your "use model", how the KER will be put in use (mode available to "customers" to generate an impact). Examples of use models: manufacturing of a new product, provision of a service, direct industrial use, technology transfer, license agreement, contract research, publications, standards, etc.
Go to Market - Timing	What is the time to market?
Go to Market - IPR Background	What is the Background (type/ partner)? Provide information considering also what already agreed in the Consortium Agreement.
Go to Market - IPR Foreground	What is the Foreground (type/ partner)? Provide information considering also what already agreed in the Consortium Agreement.

KER Exploitation Form

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The KER Exploitation Form
KER's Exploitation Form - Select the options you may consider

(how the KER will be further exploited - Select the options you may consider)

Selected route	Implementing actor
Commercialisation: deployment of a novel product/service (to the target markets)	One partner
Contract research (signed by the research group with external clients)	A group of partners
A new research project (application to public funded research programmes)	A partner
Implementation of a new university course (Note that a training course is a service)	A group of partners
Selling of the IPR	A partner
Licensing of the IPR	A group of partners
Development of a new legislation/standard	A new partnership
Spin- off	A partner
Other (please describe)	A group of partners
	A partner
	A group of partners
	By assignment
	By licensing

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Commercialization Plan

Objectives

Create a "Commercialization Plan", no longer than 12 pages, and to provide a description of each of the following areas:

- Value of the Project, Expected Outcomes, and Impacts
- Team Overview
- Market, Customer, and Competition Analysis
- Intellectual Property (IP) Protection
- Finance Plan
- Production and Marketing Plan
- Revenue Stream

Section	Description
A. Value of the Project, Expected Outcomes, and Impact	A good starting point for writing a commercialization plan is a clearly written statement that identifies the overall commercial goal of the project. This is your vision of what the product will do to meet a need and whom the project will affect.
B. Commercialization Team Overview	The team overview is asking for a brief description of the partners involved in commercialization, to give the Experts a better understanding of the team as a whole. Provide basic information such as when the organizations were created, present number of employees, corporate objectives, core competencies, and a short description of their role in the commercialization.
C. Market, Customer, and Competition	Market size is defined by total annual sales of products that address a market's particular need. Be specific about the market's needs. If applicable, when considering the targeted market, break it into primary, secondary and tertiary customer bases to describe the target segments and size while providing a brief profile of the potential customers. • e.g., 10% penetration into a €2B market results in annual sales of €200M.
D. Intellectual Property (IP) Protection	This section should summarize how the consortium will protect the intellectual property that enables commercialization of its products/service while keeping competitors at bay. Should take note if the company plans to issue additional patents throughout the process.
E. Finance Plan	Start off with estimations of raised financing broken out by the different phases. The assumptions in phase II/III should identify the timing of the financial event(s) and milestones the project hopes to achieve in the forecasted time period. These should clearly describe the timing and financial needs to commercialize the product, process, or service.

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Service 3 - G2M, Support Type 6: Access to non-EU Funding

Support Type 6: Access to non-EU Funding

Service Characteristics

- Developing thorough public/private funding strategy
- Achieve a preliminary conceptualization of an innovative project proposal

Activities included in the service:

- Identifying available funding opportunities
- Identifying which funding suits beneficiary's objectives
- Understanding how to prioritize different opportunities

Access to non-EU Funding Tools

Project Seeking Funding Template

The Project Seeking Funds Template

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Name of the leading organisation

Typology of organisation (e.g. SME/LE, NGO, University, Research centre, public body...)

Contact person

Telephone

Web site

Legal address: Street - number - town - postal code - Country

Next steps of development: Description of the developments for which you would like to obtain further funding

Investment needed: Estimate and explanation of the future investments for which you would like to obtain funding (quality and quantity, personnel costs, investments in hardware, software, external services)

Level of innovation: Describe the level of innovation (company, new-to-the-world, disruptive, incremental, etc.) and why

Key Relationships: Existing partners you wish to involve

Prospect Relationships: Further partners required (e.g. suppliers, knowledge centres, clients etc)

Key resources and investment: Resources and Funds already received, also in other projects.

Potential funding sources: Programme funding of interest (if already known)

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Grant Factsheet Template

Characterization of Funding Opportunities

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Option 1 | Option 2 | Option 3 | Option 4 | Option 5 | Option 6 | Option 7 | Option X

Call ID | Call ID | Call ID | Call ID | Call ID | Call ID | Call ID | Call ID

Geographical Level: European, National, Cross-National, Regional, Cross-Regional, Local

Funding Body: Government, Government through Allocation Agency, Third Party Contracts

Activities: IRL level, R&D, Applied R&D, Pilot, Demonstration, Training, Skills Development, Infrastructure, Energy Savings, Business Support

Funding Modes: grants, soft loans, tax credits, public funding combination, seed finance, private loans, crowdfunding, other private funding

Criteria: University/industry partnership, research-national partnership, cross-regional partnership, cross-regional partnership, specific activities required (e.g. applied research, demonstration activities, etc.), national innovation, regional innovation, local innovation, new-to-the-world innovation, job creation impact

Characterization of Funding Opportunities Form

Project Description Template

Project Description Template

INNOVATION PLACE: Project Description

WPs / activities Preliminary

Project Title: Temporary title of the project including clear keywords

Grant Scheme: Name of the Grant Scheme

Topic: Topics that best fit the project under the identified grant

Status: Open/Forthcoming

Partner search Efforts: Deadline for the identification of potential partners to be involved in the consortium

Call deadline: Date of application closing

General Objectives (public abstract): Summarize in the general scope, novelty, objectives and impacts of the projects

Project Description: Describe the specific objectives for the project, which should be clear, measurable, realistic and achievable within the duration of the project. Objectives consistent with the expected exploitation and impact of the project. (Max. 1000 characters)

Type of Partner sought

PROFILE: Type of organisation, Role in the project, Activities to be run, Ratio of the project resources for this profile

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Project Assessment Form

The Project Assessment Form

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#	Evaluation Criteria	Scoring (0-5)	Strong Point and Recommendations for improvements
1	Innovation	Top	
2	Contribution to the programme	Top	
3	Regional, National or European dimension of the topic/problem	Top	
4	Quality and Completeness of the Consortium (if required)	Top	
5	Workplan	Top	
6	Impact and Sustainability	Top	

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Types of Support under *Access to non-EU Funding* Service 3.3 of G2M

Types of support 6.1	Activities	Tools
Project Analysis And Funding Scan	Analysis of funding opportunities facilitating co-financing & GtM process of the specific projects	<ul style="list-style-type: none"> •Feedback form •Funding Programme Template
	Analysis of project's exploitation or business plan	
	Presentation of funding landscape, opportunities, criteria & requirements	
	Outline of possible funding programmes types fitting the activities/projects to be funded	
	In-depth funding scan	
	3-hours coaching session on setting up funding strategy	
Types of support 6.2	Activities	Tools
Funding Strategy	Support in the evaluation of identified funding possibilities "pros and cons"	<ul style="list-style-type: none"> •Report on Funding Opportunities
	Advice on (strategic) prioritization of different funding opportunities	
Types of support 6.3	Activities	Tools
Funding application coaching	Optimization of project application concept, structure, content and argumentation	<ul style="list-style-type: none"> •Project Assessment Form •Project Description template
	Support to application concept development and project positioning	
	Feedback on the proposal and additional input	
	Project qualitative assessment	



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