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TOPIC: INNOSUP-09-2018
TYPE OF ACTION: Coordination & Support Action
START DATE: 1 January 2019
DURATION: 36 months

PROJECT

INNORATE

Data-driven tools for supporting and improving
the decision-making processes of investors for financing innovative SMEs

D7.1 Dissemination and Communication Plan – initial version

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DISSEMINATION LEVEL

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CO	Confidential, only for members of the consortium (including the EC)	



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Executive summary

This deliverable presents the **Dissemination and Communication Plan (DCP)** for InnoRate, laying out the strategy that will guide the consortium's communication, awareness raising and dissemination efforts that will be carried out during the project's life cycle.

The document provides an overview of the overall communication and awareness raising process but also the management and monitoring of dissemination activities with a view to ensure the highest possible outreach of the project's activities and results to the relevant audiences. It also describes future steps to be taken in cooperation with other work packages.

In more detail, this document includes the following:

- The dissemination **objectives** of the InnoRate project;
- The main **targeted audiences**;
- The **dissemination tools** and **communication channels** which will be used by the consortium partners aiming to the maximum visibility and public awareness (i.e. promotional material, social media, website, newsletters, events organised by the project, external events which partners will participate in, scientific and non-scientific publications, synergies with other similar projects and initiatives);
- The **reporting templates** of the communication and dissemination activities, which need to be completed by partners throughout the project (event's reporting, template for participation in external events/conferences, and the overall dissemination reporting template);
- The **key performance indicators for monitoring and evaluation** of the dissemination activities implemented under WP7;
- The **roles and responsibilities** of the partners with regards to the project's communication and dissemination activities;
- The **time plan** illustrating the stages of dissemination and stakeholder engagement activities.

All partners are expected to actively participate and contribute in the implementation of the dissemination activities and according to the dissemination and communication strategy, while White Research, as a leader of the WP7, will closely monitor the dissemination actions described in this document and provide all the necessary support.

1. Introduction

The aim of this document is to set the operational framework for the project's dissemination strategy towards an effective dissemination of the project's results and to define the frame of reference for the InnoRate partners for an effective dissemination, promotion and communication of the project's activities and results.

The overall aim of InnoRate's DCP is to promote the project's vision, its activities and results to a wide group of stakeholders. The main objective is to guide the consortium in creating and enhancing awareness of InnoRate activities and results by reaching out to defined target groups, thus helping to achieve the success of the project, in line with the contractual obligations that the consortium has undertaken with the European Commission.

To do so, this document addresses the core components of an effective dissemination strategy by:

- introducing the different purposes of communication and dissemination activities;
- identifying the key target audiences;
- presenting the core messages of project and outlining the main assets;
- defining the tools and communication channels which will be used to reach the target audiences along with the required actions and resources;
- defining responsibilities among partners and explaining how the dissemination activities will be administered;
- summarising the internal monitoring, evaluation and reporting of dissemination activities; and
- providing an indicative timetable of promotion activities during the life cycle of the project.

The dissemination actions will be carried out throughout the entire duration of the project (M1-M36) aiming at both raising awareness on the project activities and functioning as an additional feedback mechanism that will lead to further refinements of our work. Moreover, they will focus on spreading the InnoRate messages and results through a wide range of online and physical tools and channels. It has to be underlined that the deployment of the InnoRate dissemination strategy will require the active collaboration of all project partners who commit to invest time and resources in raising awareness on the project and in effectively reaching the target audiences.

Overall, the current dissemination strategy document assists partners in designing and implementing their publicity, communication and engagement activities, within the framework of the project. It does so also referring to guidelines that can help achieve maximum visibility, so as to pave the way for a successful market uptake of the InnoRate results (see Annex 1. InnoRate Dissemination and Communication Guidelines). However, both this report and the accompanying guidelines are subject to modifications and updates in line with the project progress and the experience that will be gathered through the various project activities. As such, the dissemination, awareness raising and communication strategy that is presented here is not static. Instead, it will be continuously reviewed in specific time intervals to account for any challenge or opportunity that may arise. A second and final version of the DCP is already foreseen for M18, and is expected to build upon the experiences gathered within the first 18 months of InnoRate activities in order to update our dissemination strategy.

2. About InnoRate project

InnoRate is set on deploying a trusted, objective and recognised service platform across the EU and Associated Countries **to support and improve the decision-making processes of investors and lenders** for vetting, prioritising and ultimately financing innovative SMEs with high growth potential.

The novel **InnoRate Technology Rating Platform** will provide a suite of digital **decision support tools and services**, reinforced by **well-customised innovation assessment and rating methodologies** that go beyond the traditional credit-focused approaches in evaluating the technological and business potential and risks of innovations. To develop these novel methodologies, the project draws inspiration from the trusted and widely applied **KOTEC Technology Rating System (KTRS)**, with a view to adapting it to the EU reality. KTRS has been used for more than 20 years in the Republic of Korea, supporting hundreds of thousands of innovative SMEs to access finance and grow.

Leveraging the wealth of existing data, semantic technology and in-depth human expertise, the **InnoRate Technology Rating Platform** aims to:

- Minimise the time and resources (human and financial) required by investors and lenders for assessing innovative SME cases;
- Make the prospects of innovative SMEs clear to investors;
- Reduce knowledge and information asymmetries and risk premiums paid by innovative project managers.

Ultimately, InnoRate's vision is to disrupt the largely risk-averse financial sector of the EU and AC, enhancing the innovation capacity of high growth technology sectors and paving the way for disruptive innovations to flourish, so as to place Europe in the forefront of the global innovation game. To put it simply, **we want to bring innovation to finance and finance to innovation.**

The **InnoRate Technology Rating System**, along with its rating methodologies and digital decision-support tools, will be piloted in the context of the **investment readiness** and **match making services** that will be offered by the project to interested stakeholders, covering a **diverse set of use cases**, ranging from investors scouting for and prioritising high-growth potential SMEs for access to finance, to financial institutions assessing such SMEs for loan-based financing.

3. Dissemination strategy

3.1 Overview and objectives

The InnoRate DCP defines a clear strategy for dissemination activities considering multiple key elements and covering the entire project duration. Therefore, it will function as a horizontal document that is connected to all parts of the project workplan and its respective activities.

The main aim of the strategy is to enable a wide reach and to contribute to a positive impact of the project, both exploiting the knowledge within the consortium and transferring knowledge created in the project further to interested stakeholders. This strategy defines clear guidelines for all the dissemination activities, which will be carried out throughout the project, including all operational elements of dissemination.

Overall, the InnoRate dissemination strategy has a number of high-level objectives which are the following:

- Promote the project's concept, activities, and events to interested target groups and stakeholders;
- Enhance the awareness of the project's goals and assets;
- Encourage involvement in the project's activities;
- Encourage participation in relevant conferences and other events;
- Disseminate the project's results and knowledge collected to the public;
- Establish liaisons and synergies with other relevant initiatives;
- Facilitate market uptake of the project's results;
- Define partners' responsibilities in dissemination activities.

To ensure a successful outcome of the abovementioned objectives, our dissemination strategy focuses on a practical and realistic plan including the appropriate tools, channels and actions to engage the target audiences, but also remains flexible and open to changes when necessary. The key element for a successful dissemination plan is a well-structured methodology based on **what we want to disseminate** (project assets), **to whom** (which target groups), **by what means** (strategies, dissemination tools, channels etc.), and **when to disseminate**. Keeping these in mind, the following steps emerge:

- Identify the project's aims and appropriate communication channels to ensure maximum visibility;
- Identify the main target groups and appropriate communication channels for each;
- Identify the key messages and project's assets;
- Link dissemination channels to each target group and define dissemination tools and methods which will be used during the project;
- Establish the roles and responsibilities of the partners in executing and managing the project's communication and dissemination activities;
- Monitor key dissemination indicators and adjust when necessary;
- Determine the stages of the dissemination activities and overall timeline.

3.2 Target audiences, key messages and key assets

3.2.1 The InnoRate target audiences

All dissemination activities will contribute to the overall aim of facilitating the widespread adoption of InnoRate's results, thus maximising the project's impact. Therefore, it is essential to clearly specify the InnoRate's target groups.

In order to create maximum impact for the InnoRate communication and dissemination actions, an initial Stakeholders Classification Model¹ has been followed to identify the main target audiences of the project. This model will be further elaborated in the frame of the second version of this strategy (D7.2, M18) and will build upon the experience gathered by then, to define a number of parameters for each identified stakeholder group such as:

- The power of each stakeholder: level of stakeholder's authority
- The interest in the project outcomes
- The level of active participation in the project
- The ability to change parts of the project planning and outcomes: stakeholder's influence.

As a matter of fact, the type of communication and the message conveyed change depending on the level of interest and the influence of a certain group of stakeholders as well as on the impact that the project (or one of its activity) has on that group, as illustrated in the simple diagrams below.

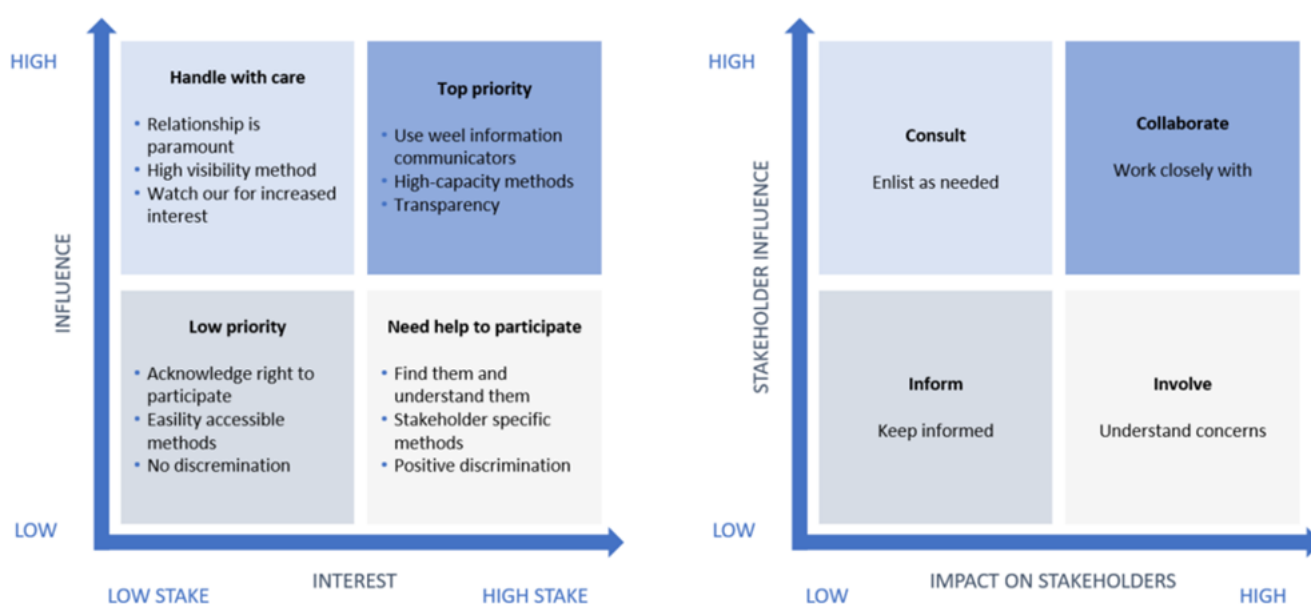


Figure 1. Stakeholder mapping and stakeholder engagement tools

At this stage, the stakeholder groups that are illustrated in the figure below have been identified as relevant to InnoRate and, thus, represent the target audiences of the current strategy. These groups cover several stakeholder categories across different regions. It has to be mentioned that in the frame of D7.2, this list of target stakeholder might be adapted based on collected project experience and actual data.

¹ Emerson Wagner Mainardes, Helena Alves, Mário Raposo, (2012) "A model for stakeholder classification and stakeholder relationships", Management Decision, Vol. 50 Issue: 10, pp.1861-1879.

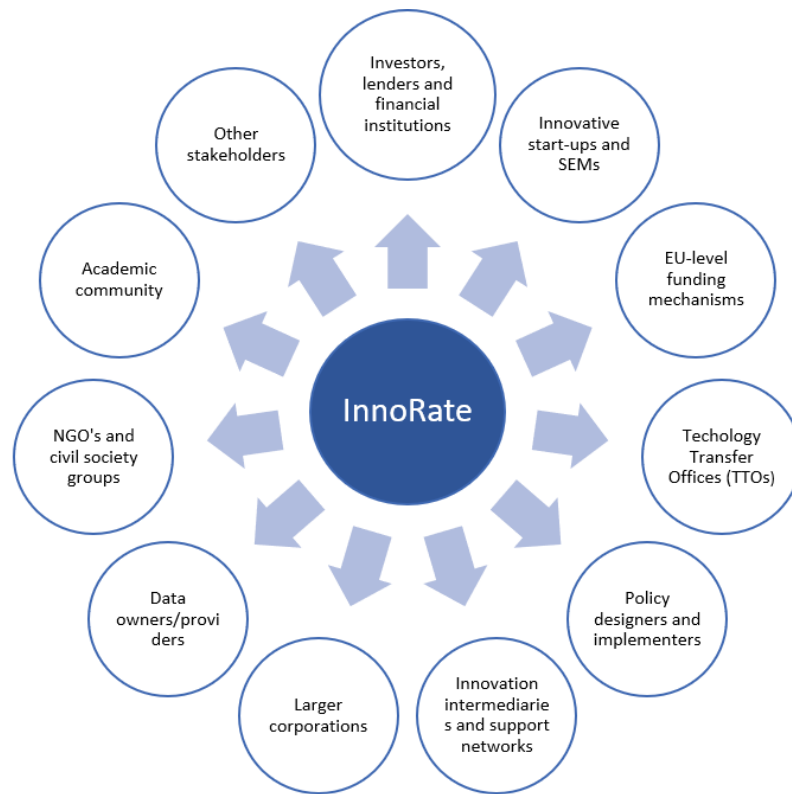


Figure 2: InnoRate's target audiences

- **Investors, lenders and financial institutions:** one of the key target audiences of InnoRate consisting of stakeholders scouting for, assessing and prioritizing high growth potential SMEs (e.g. private equity firms, business angels, venture capital, commercial, promotional banks, funds, etc.).
- **Innovative start-ups and SMEs:** this refers to start-ups and SMEs with potentially market creating innovations, looking to build their investment readiness and access suitable prospective investors (e.g. applicants and/or beneficiaries from EU and national funding instruments such as InnovFin, FET Open, SME instruments, etc.) but also promising SMEs, which lack the security or financial record required for accessing finance based on more traditional assessment and rating systems.
- **EU-level funding mechanisms:** this includes institutions, which provide funding to SMEs through venture capital, risk finance instruments and other relevant dedicated funding programmes. (e.g. European Investment Bank, European Investment Fund, European Innovation Council, COSME).
- **Technology Transfer Offices (TTOs):** this category covers any opportunity to bring to market promising research results and technologies through technology transfer and commercialisation officers.
- **Policy designers and implementers:** (e.g. in regional/national/EU authorities, development agencies, etc.).
- **Innovation intermediaries and support networks:** (e.g. European Innovation Council Pilot, EEN, etc.).
- **Larger corporations:** this group consists of corporations which are seeking to enhance their portfolio of start-ups or assess their current portfolios' status.
- **Data owners/providers:** this covers any data owners and data providers of start-ups, SME, investors, financial databases patent and bibliometric data sources.

- **Non-governmental organisations and civil society groups:** this category covers all types of NGOs, not-for-profit organizations and civil society groups, active within the European innovation ecosystem.
- **Academic community:** this refers to the academic community with a focus on finance, data analytics and project innovation researchers (e.g. universities, research and technology organisations, etc.).
- **Other stakeholders:** (e.g. technology providers, IP protection / patent offices, etc.).

3.2.2 The InnoRate key messages

A critical part of an effective dissemination plan is to define the core messages that will be communicated to the target audiences. The key messages should be aligned with the core concepts and vision of the project, but also adapted to the needs of specific target groups (e.g. different messages to reach out to SMEs who are concerned with accessing finance issues and different messages to reach out to investors and financiers who are concerned with making the right choices when it comes to investing or lending). Although these messages will be specified as the project progresses, based on the actual data and outcomes and on the milestones achieved, an initial list of key messages of the project that should be communicated is provided below as a reference point:

- **InnoRate brings innovation to finance and finance to innovation.**
- **For investors financing innovative, tech-driven SMEs. InnoRate can:**
 - Help minimise the time and resources required for assessing innovative SME cases.
 - Enhance the decision-making process for financing innovative SMEs.
 - Reduce information asymmetries.
- **For innovative SMEs with high growth potential InnoRate can:**
 - Help make your prospects clear to investors.
 - Help mitigate investors' perceived financial risks.
 - Lead to the reduction of risk premiums.

If necessary, in the second version of the DCP, these messages will be refined and more messages will be added based on the experience gathered during the project. Note that in order to fulfil the project's ambitions and claims, the above concepts/messages must be communicated in their entirety.

3.2.3 The InnoRate key assets

The InnoRate project will have specific assets that can be of interest for different stakeholder categories. Although the assets will be defined in parallel to the unfolding of the project activities, a preliminary list of core assets is the following:

- The InnoRate Service Platform and components
- The InnoRate Technology Rating System
- The InnoRate assessment and rating methodologies
- Validated tailored indicators and weightings
- InnoRate data analytics and services
- APIs

- InnoRate training modules
- Collection of multi-sided datasets
- InnoRate Policy Recommendation and Uptake Guide

3.3 Dissemination channels and activities

In the frame of InnoRate various communication channels will be exploited both online and offline with a view to maximise the project's visibility to different stakeholders. To this end, a blend of communication channels and activities has been identified below:

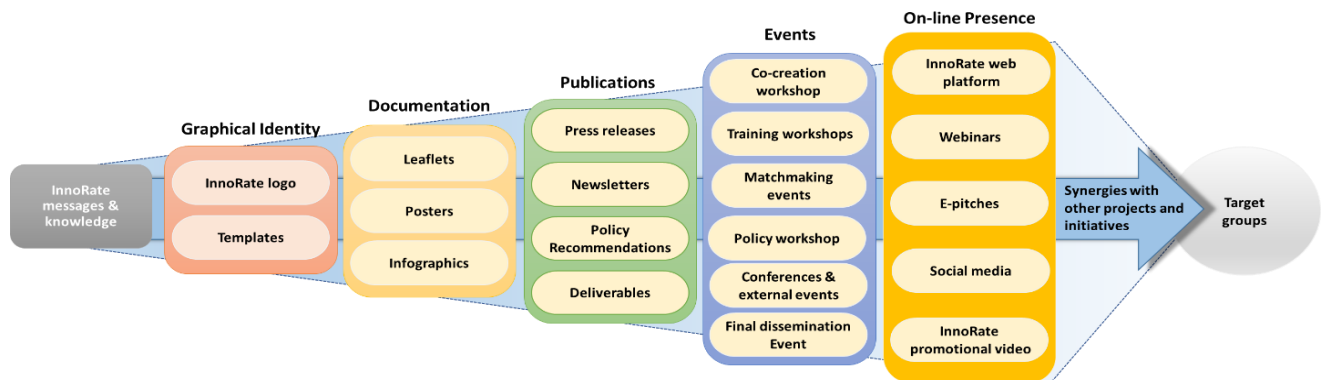


Figure 3: InnoRate's communication activities

1. InnoRate's promotional material and graphical identity:
 - Logo
 - Leaflet
 - Poster
 - Templates (i.e. for publications, and presentations)
 - InnoRate promotional video
 - Other ad-hoc promotional material (i.e. press releases, infographics)
2. InnoRate's Social Media Accounts (SMAs):
 - Twitter
 - Facebook
 - LinkedIn
 - YouTube
3. InnoRate's online presence
 - Web portal
 - Newsletters
4. Events
 - Organisation of project events (e.g. Co-creation workshop; Training workshops; Matchmaking events; Policy workshop; Final dissemination event)

- Participation in external conferences and events
5. Publications
- InnoRate’s public deliverables
 - Other (e.g. magazines, newsletters, online media, etc.)
6. Synergies with other relevant projects and initiatives

The expected use of communication and dissemination channels by the consortium is described in the dedicated guidelines (Annex 1). A more detailed description of each channel is provided in section 4.

Table 1: Overview of the tools to be used to reach different target audiences

	Investors, lenders, and financial institutions	Innovative start-ups and SMEs	EU-level funding mechanisms	TTOs	Policy designers and implementers	Innovation intermediaries and support networks	Large Corporations	Data owners/ providers	NGO's	Academic community	Other stakeholders
Promotional material											
Visual identity (e.g. logo, leaflets, templates, posters etc.)	X	X	X	X	X	X	X	X	X	X	X
Social media											
Twitter	X	X	X	X	X	X	X	X	X	X	X
Facebook	X	X	X	X	X	X	X	X	X	X	X
LinkedIn	X	X	X	X	X	X	X	X	X	X	X
YouTube	X	X		X		X					X
Digital media											
Web portal	X	X	X	X	X	X	X	X	X	X	X
Newsletter	X	X	X	X	X	X	X	X	X	X	X
Events											
Co-creation workshop	X	X		X	X	X					
Validation workshop	X	X		X		X					
Training workshops	X	X		X		X					
Matchmaking events	X	X		X		X	X				
Policy workshop	X	X		X	X	X					
External events	X	X	X	X	X	X	X	X	X	X	X
Final dissemination event	X	X	X	X	X	X	X	X	X	X	X
Publications											
Public deliverables	X	X	X	X	X	X	X	X	X	X	X
Other	X	X	X	X	X	X	X	X	X	X	X

3.4 Roles and responsibilities

In order to achieve the aims and objectives of the dissemination plan, all team members of the consortium will play a key role during InnoRate's communication activities. Partners' contribution will be a natural by-product of the project's development as most activities, results, milestones and progress will either involve communication activities and engagement or turn into communication assets. Furthermore, partners are expected to help with the online presence of InnoRate by providing content for the website and the project's Social Media accounts. This contribution can be anything, from a Facebook post to an article reflecting on an InnoRate dissemination activity, with the goal of creating a constant flow of content regarding the project's actions.

Finally, partners are welcome to pursue the widest possible exposure of the project through their participation in relevant events/conferences, publications for online/offline sources of information (e.g. websites, newspapers, magazines, etc.).

At the end of each project semester, all partners are required to present the main dissemination actions they carried out during the semester, by filling in the Dissemination Reporting template (Annex 2). Dissemination actions mentioned in this template could be the organisation of event, participation to event, informal meetings, interviews, communication campaign (e.g. newsletter send outs, leaflets, etc.), publications, training, other.

Along with the Dissemination Reporting template partners are asked to complete the Event's Reporting template (Annex 3) for each event that they organised or participated in during the semester, presenting the main dissemination actions that took place in that specific event.

4. Dissemination and Communication tools and channels

4.1 Promotional material

White Research is responsible for the preparation of the graphic design and content of all printable promotional material of InnoRate, while each partner will be responsible for printing according to its specific needs.

The promotional material of the project will be mainly used at the project's events, external events where partners will participate in and in the everyday publicity of the project.

4.1.1 Logo

A project logo and visual identity have been developed (M2) in order to satisfy the visual and graphic requirements of the project. To achieve maximum visibility, the logo has the capability to make the project recognisable and will form the basis for the design of all the promotional material, which will be used for the different promotional and communication materials (e.g. leaflets, posters, infographics, newsletters, deliverables, social media, web-portal, publications, publicity for internal and external events, etc.).

During the kick-off meeting of the project, various logo options were presented to the partners in order to state their preferences and select their favourite design. The selected logo of InnoRate was adopted in agreement with all partners and it is presented below.



Figure 4. InnoRate logo

The design of the logo represents an organic rating chart of a technological network of companies and the path that connects them with the potential investors and backwards. Overall, it aims to symbolise the stakeholder-driven feedback loops, allowing to collect the necessary data. The logo colours (i.e. Strong cyan: #00acd4; Very dark (mostly black) red: #221f1f; and black: #000000) are the colours of the project and should be used whenever possible to ensure consistency and to reinforce the visual identity of the project.

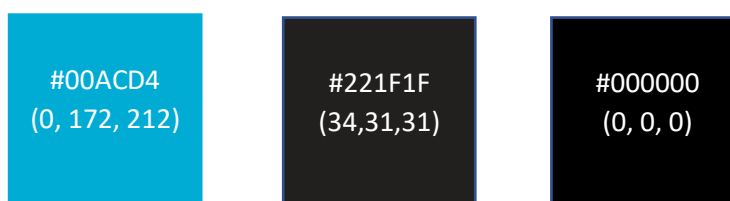


Figure 5. The colour codes of InnoRate

In addition to the InnoRate project logo, in any communication material, deliverable, presentation, etc. produced in the frame of the project, the EU flag will be shown.



Figure 6. The flag of the European Union

The EU flag will be always accompanied by the following statement: *“InnoRate has received funding from the European Union’ Horizon 2020 research and innovation programme under Grant Agreement No. 821518”*.

4.1.2 Leaflet and Poster


Leaflets and posters are important tools to support the dissemination and communication activities of InnoRate project to attract the interest of stakeholders from the various target audiences.

The leaflet will be produced by M3 and it will introduce the InnoRate’s concept and approach, its objectives, expected results, and contact details. The InnoRate poster will also be developed in M3 and will illustrate basic information of the project’s vision and approach, including visual elements, to catch the attention of the audience.

Both promotional products will also provide information about the partners involved, together with contact, website and SMAs details and will acknowledge the funding that the project receives through the Horizon 2020 programme. Both leaflet and poster will be available in downloadable electronic form on the InnoRate web-portal. Furthermore, hard copies will be available for distribution at various events that will be organised in the frame of the project but also in external events, which partners will participate to.

The draft versions of the project leaflet and poster are illustrated below. These versions may undergo modifications based on the comments collected from the project coordinator and the partners.










INNORATE's purpose is to support and improve the decision-making processes of investors for financing innovative, tech-driven SMEs. For doing so, we set on deploying a novel service platform across the EU and Associated Countries (AC), offering objective and forward-looking rating methodologies to technology and innovation.



PROJECT ID





- Project Name:** InnoRate
- Topic:** "Data-driven tools for supporting and improving the decision-making processes of investors for financing innovative SMEs"
- Grant Agreement:** 821518
- Type:** Coordination and Support Action
- Start date:** 1 January 2019
- Duration:** 36 months
- EU contribution:** € 2,998,500,00
- Coordinator:** Q-PLAN INTERNATIONAL ADVISORS PC (www.qplan-intl.com)

FULL CONSORTIUM


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 InnoRate Project

InnoRate has received funding from the European Union's Horizon 2020 research and innovation programme under Grant Agreement No 821518.



INNORATE
www.innorate-project.eu

Innovation is key for the competitiveness of the European economy and needs to be adequately supported with investments. In parallel, access to finance for innovative, market-creating SMEs can be challenging, and most investors end up passing up on promising investment opportunities.

By developing and providing the **InnoRate Technology Rating System** along with a suite of digital decision support tools and services, we will support **investors and lenders** for vetting, prioritising and financing innovative SMEs with high growth potential.

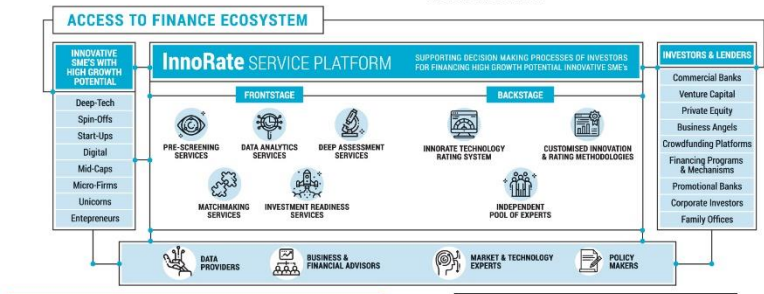
THE InnoRate APPROACH

We design and develop the **InnoRate Technology Rating System (ITRS)** that is reinforced by customised rating methodologies which move away from traditional credit-focused approaches in innovation assessment. The ITRS, along with a suite of digital **decision support tools and services leveraging the wealth of existing data, semantic technology and in-depth human expertise**, will be offered under the umbrella of the **InnoRate Service Platform** and tested across diverse real-life scenarios.

3 PILLARS

- InnoRate Technology Rating System (ITRS)**
For developing our Technology Rating System, we draw inspiration from the trusted and widely applied **KOTEC Technology Rating System (KTRS)**, with a view to adapting it to the EU reality. KTRS has been used for more than 20 years in the Republic of Korea, supporting **hundreds of thousands** of innovative SMEs to access finance and grow, helping them acquire **more than €75 billion in total**. The **InnoRate Technology Rating System** will be strengthened with innovation assessment and rating methodologies that will be customised to the needs and particularities of diverse SMEs and investors.
- Combination of ICT & human expert knowledge**
InnoRate acknowledges the importance of ICT in accelerating and scaling assessment processes and offers part of the InnoRate Technology Rating System as a **digital, self-administered pre-screening service** that SMEs can easily access to rate their innovation. At the same time, we recognize the need for building trust and confidence to the Platform's users; this is why we **blend ICT with human expertise through our deep-assessment services** where experts bring in their market and technology insights required to evaluate more hard-to-grasp aspects of business prospects and risks.
- InnoRate Service Platform**
Our innovation assessment and rating services are offered under the umbrella of a pan-European service platform, together with a series of tailored investment readiness, matchmaking and data analytics services. The digital **InnoRate Service Platform** enhances the accessibility and outreach of our solutions, minimises the expertise and resources required by SMEs and investors for technology assessment and rating and offers the necessary efficiency for a large-scale, international operationalisation.

ACCESS TO FINANCE ECOSYSTEM



ARE YOU AN INVESTOR FINANCING INNOVATIVE, TECH-DRIVEN SMEs?

InnoRate can:

- Help you minimise the time and resources required for assessing innovative SME cases.
- Reduce information asymmetries and enhance your decision-making process for financing innovative SMEs.

ARE YOU AN INNOVATIVE SME WITH HIGH GROWTH POTENTIAL?

InnoRate can:

- Help you make your prospects clear to investors.
- Help you mitigate investors' perceived financial risks and reduce risk premiums paid by innovative project managers.

Ultimately, InnoRate's vision is to disrupt the largely risk-averse financial sector, enhancing the innovation capacity of high growth technology sectors and supporting disruptive innovations to flourish.

To put it simply, InnoRate aims at bringing innovation to finance and finance to innovation.

WE PLAN TO ACHIEVE OUR GOALS BY

- Developing a **forward-looking InnoRate Technology Rating System** and **moving away from one-size-fits-all solutions**, by analysing the needs of innovative SMEs and investors and ensuring a demand-driven design for our services and pilot cases.
- Defining tailored **investment readiness and matchmaking services** to enable innovative SMEs to connect with suitable investors.
- Defining tailored **investment readiness and matchmaking services** to enable innovative SMEs to connect with suitable investors.
- Building a **pan-European InnoRate Service Platform** that will function as a single access point for the InnoRate Technology Rating System and the project's digital tools and services.
- Testing our **methodologies, tools, and services** in real-life settings that cover a diverse set of use cases.
- Building on our concrete use cases to elaborate **policy recommendations and practical guidelines** helping stakeholders to adopt and scale the InnoRate results in the EU and AC.

Figure 7. The recto and verso draft versions of the leaflet

INNORATE

BRINGS INNOVATION TO FINANCE & FINANCE TO INNOVATION

INNORATE IS ABOUT SUPPORTING AND IMPROVING THE DECISION-MAKING PROCESSES OF INVESTORS FOR FINANCING INNOVATIVE, TECH-DRIVEN SMEs IN EU AND ASSOCIATED COUNTRIES.

BENEFITS

FOR INVESTORS FINANCING INNOVATIVE, TECH-DRIVEN SMEs
InnoRate can enhance your decision-making process for financing innovative SMEs.

InnoRate Technology Rating System (ITRS)
Offering forward-looking technology and innovation assessment.

Investment-readiness and matchmaking services
Supporting innovative SMEs to connect with suitable investors.

FOR INNOVATIVE SME WITH HIGH GROWTH POTENTIAL
InnoRate can help you to make your prospects clear to investors shedding light on your innovative talent.

Moving away from one-size-fits-all solutions
Customisation to the needs, strengths and weaknesses of SMEs and investors.

InnoRate Service Platform
A digital interface for the ITRS and our services, offering easy access and cost-effectiveness.

Blending ICT with human expertise
Striking an ideal mixture of speed, convenience, and trust for our services.

Application in real-life cases
Supporting real assessment and financing processes across the EU and Associated Countries.

VISIT
www.innorate-project.eu

CONTACT US
info@innorate-project.eu

FOLLOW US
[f @InnoRateProject](#)
[t @innorateproject](#)
[InnoRate Project](#)
[InnoRate Project](#)

FULL CONSORTIUM

InnoRate has received funding from the European Union's Horizon 2020 research and innovation programme under Grant Agreement No 821518.

Figure 8. The draft version of the poster

4.1.3 Templates

In order to facilitate the collection of the input from the partners regarding the dissemination activities, several templates have been prepared. With a view to design an easily recognisable graphical identity for the project, the following templates are being developed:

- The InnoRate presentation template;
- Project deliverables and reports template.

In addition to the above mentioned templates, an InnoRate letterhead is also being developed. This project letterhead will be used for various project activities, and especially for official invitations to events.

These templates are shown below.



Figure 9. The presentation template



PROJECT ACRONYM: InnoRate
 PROGRAMME: HORIZON 2020
 TOPIC: INNOVATION-09-2018
 TYPE OF ACTION: Coordination & Support Action
 START DATE: 1 January 2019
 DURATION: 36 months

PROJECT

INNORATE

Data-driven tools for supporting and improving
the decision-making processes of investors for financing innovative SMEs

Title title title

ISSUED BY: Name Organisation ISSUE DATE: dd/mm/yyyy DUE DATE: dd/mm/yyyy

Work Package: Nr. _____

Work Package Leader: Name organisation _____

DISSEMINATION LEVEL

PU	Public	
PP	Restricted to other program participants (including the EC services)	
RE	Restricted to a group specified by the consortium (including the EC Services)	
CO	Confidential, only for members of the consortium (including the EC)	✓



InnoRate has received funding from the European Union's
Horizon 2020 research and innovation programme
under Grant Agreement No 821518.

Figure 10. The template for the cover of project publications



CONTACT US: info@innorate.eu
VISIT: www.innorate.eu



 InnoRate has received funding from the European Union's Horizon 2020 research and innovation programme under Grant Agreement No 821518.

Figure 11. The letterhead

4.1.4 InnoRate promotional video

A promotional video will be produced (in M15) to raise awareness and to exploit viral effects. The video will be uploaded to the project's YouTube channel, project's website and will be shared on the other SMAs. This short video will give an overview of the project, its objectives and present the main actions that will be developed during InnoRate project.

4.1.5 Other promotional material

With a view to enhance its dissemination outreach, InnoRate will also produce additional promotional material for press releases, factsheets and infographics when necessary. In particular, press releases will be produced on an ad-hoc basis, especially when achievements, progress and important actions are achieved or foreseen (i.e. an upcoming event). General press releases will also be developed, when necessary, targeting stakeholders at the EU level. These press releases will aim to inform stakeholders about the overall project actions and results, but they will also incorporate space for featuring specific

stories from the pilot cases. Press releases can also be produced prior to each project meeting or project event with the purpose of attracting local media attention.

4.2 InnoRate digital presence

4.2.1 InnoRate web-portal

The web-portal is a key communication tool to increase the project visibility and impact, presenting the progress of the project to wider audiences. The InnoRate web-portal will be launched in the end of M4 of the project and will serve as the online platform for public and consortium communication. The structure and content of the website will be designed to ensure ease of use and will clearly report the project's concept and objectives but also contain relevant information about its progress, with news and event announcements.

ONTO is the partner responsible for the development, maintenance, and management of the website, assisted by White Research who will be responsible for the design and the content development. Should there be any changes in the allocation of responsibilities, they will be duly indicated in the updated version of the Dissemination and Communication plan. The portal will be designed in line with the web 2.0 paradigm and will be built in WordPress. Special attention will be paid to a type of website that is responsive and accessible via and compatible with a variety of devices, including mobile ones.

Besides the key information which will be presented, the web-portal will encompass all publishable project's outcomes, promotional material, reports, publications, deliverables and further resources of interest (including links to third parties websites). The website will reflect the work happening in the context of InnoRate, and especially the progress in the development of the InnoRate Technology Rating System (ITRS), along with real life applications of testing our methodologies, tools and services. Hence, all partners are expected to contribute to the content development process with news and updates. The website will regularly report on project's activities, internal and external events, findings, publishable outcomes, information about partners and similar projects/initiatives, as well as other news that are relevant to the project and its development.

At the current stage, a **draft architecture** of the web-portal has been conceptualised, while the final structure will be presented in the updated version of the project's dissemination and communication strategy plan (M18). The sitemap is illustrated below:

- **Home page**
- **About.** It will include the following information:
 - **About** – a small summary of the project
 - **InnoRate goals** – description of the project's objectives
 - **Concept and approach** – description of the InnoRate concept and the main pillars on which it is built
 - **InnoRate Services** – description of the project's main activities and pitching events
 - **Consortium** – divided into Partners and Experts/ Advisory Board/ Pool of Experts
- **The platform.** It will include the following information:
 - What services are offered through the platform
 - Platform users:
 - SMEs – information about registration requirements, rating results/reports, benefits for the SMEs
 - Investors and lenders – available information about SMEs, benefits, etc.
 - Link to the InnoRate Service Platform
- **Pilots.** It will include the following information:

- Small description of the pilot use cases of the project
- Description of the process what will be followed
- Description and links to some of the pilot use case, in which most specific information may be included
- **Resources.** Divided into:
 - Reports – deliverables reports, other relevant reports
 - Dissemination material – this would be split into: project logo, leaflet, poster, photo gallery, videos
 - Related projects – links to other EU funded similar projects
- **News.** Continuous updates by WR with the support of partners. This section is divided into 3 main sections:
 - News
 - Events
 - Newsletters
- **Contact.**
 - General InnoRate email information
 - Coordinator’s contact details
 - InnoRate’s social media accounts details

HOME	THE PLATFORM	RESOURCES
ABOUT	PILOTS	<u>InnoRate Reports</u>
About		Dissemination material
<u>InnoRate goals</u>		Project logo
Concept & Approach		Poster
<u>InnoRate Services</u>	NEWS CENTRE	Leaflet
Activities	News	Photo gallery
Consortium	Events	Videos
Partners	Upcoming events	Related projects
Advisory Board	Past events	
Pool of Experts	Newsletters	CONTACT
		PRIVACY POLICY

Figure 12. Tentative sitemap

The above-mentioned points constitute a baseline for the website. This will be updated when necessary in order to be in line with the project’s requirements and progress. The URL for the website is expected to be <http://www.innorate-project.eu/> and the contact email for the project will be in line with it (e.g. info@innorate-projet.eu).

For the monitoring of the website’s traffic, the Google Analytics service will be used. This tool provides useful statistics that will help to optimise the website and dissemination strategy. Statistics that will be kept under observation are mentioned in Section 5.

4.2.2 Newsletter

The project has committed to produce a bi-annual newsletter, which will be distributed to the project’s target audience and uploaded to our website. The newsletter will summarise updates on the project’s progress and actions and will represent an alternative way to inform potential and/or existing

followers with regards to the project's concepts. Furthermore, the newsletter is a way to attract and retain stakeholders that are not familiar with social media or people who are not interested enough during the initial phases of the project, in order to keep them connected and try to engage them at a later stage.

The newsletters will be prepared by White Research, with the contribution of all partners to specific content when necessary. Mailchimp will be employed for the development and distribution of the newsletter. Although the content of each newsletter will be agreed upon by the partners, in general, the newsletter will mainly include the following sections:

- An introductory section briefly describing the InnoRate project
- Progress updates
- A project's news section including articles which will describe the main activities that carried out during the last six months
- A section dedicated to future developments (e.g. upcoming events)
- A section listing other relevant major events
- Other types of relevant articles

4.3 Social Media Accounts (SMAs)

The SMAs are valuable tools, which will act as one of the main pillars to promote the project and its ongoing activities. More specifically, a Facebook page, a Twitter account, a LinkedIn account, and a YouTube channel were launched in M2, aiming to build an online community of supporters and followers that will continue to exist beyond the duration of the project. The table below gives an overview of the different target groups that the SMAs will address.

Social Network	InnoRate Target Audience	Objectives
Facebook	<ul style="list-style-type: none"> • Investors, lenders, and financial institutions • SMEs • TTOs • EU-level funding mechanisms • Policy makers and implementers • Innovation intermediaries • Large corporations • Data owners/providers • NGOs • Academic community • Other Stakeholders 	To build a strong group of followers and take advantage of the interests this audience has in common with the project (and its concepts and activities); to use visual material (i.e. photos, short video clips) to publicise project outcomes.

Social Network	InnoRate Target Audience	Objectives
Twitter	<ul style="list-style-type: none"> • Investors, lenders, and financial institutions • SMEs and start-ups • TTOs • EU-level funding mechanisms • Policy makers and implementers • Innovation intermediaries • Large corporations • Data owners/providers • NGOs • Academic community • Other Stakeholders 	To enable the effective monitoring of developments and progress in other related projects and relevant organisations; to steer attention towards the concepts and results of InnoRate; to identify opportunities for creating synergies with other similar initiatives
LinkedIn	<ul style="list-style-type: none"> • Investors, lenders, and financial institutions • SMEs and start-ups • TTOs • EU-level funding mechanisms • Policy makers and implementers • Innovation intermediaries and support networks • Large corporations • Data owners/providers • NGOs • Academic community • Other Stakeholders 	To have a more institutional approach in order to boost professional and expert discussions on issues of common interest and possibly involve large corporations, more start-ups, innovation intermediaries and support networks
YouTube	<ul style="list-style-type: none"> • Investors, lenders, and financial institutions • SMEs • Other stakeholders 	To contribute to increasing the visibility of the project and bring it closer to the audience by giving faces and voices to the actual participants

White Research will be responsible for the administration of InnoRate's social media accounts. However, all partners are expected to contribute by:

- Becoming a follower (like or follow the page/profile);
- Promoting the accounts in their networks;
- Suggesting relevant profiles that InnoRate should connect with;
- Promoting posts and news through the social media accounts of their own organisations.

4.3.1 Facebook

A Facebook page was created (M2) aiming to build a strong group of followers. This dissemination channel provides an excellent opportunity to share InnoRate news and results among the followers interested in topics that are connected to the project's objectives and activities. More specifically, InnoRate's Facebook account will serve as a:

- **News and discussion hub** by sharing information or news related to the project actions;

- **Platform to deliver updates** about developments and results of the project (e.g. key events, activities, and important achievements);
- **Link to other similar groups and pages** associated to relevant and overlapping concepts;
- Additional tool which will **collect feedback** from users/followers.

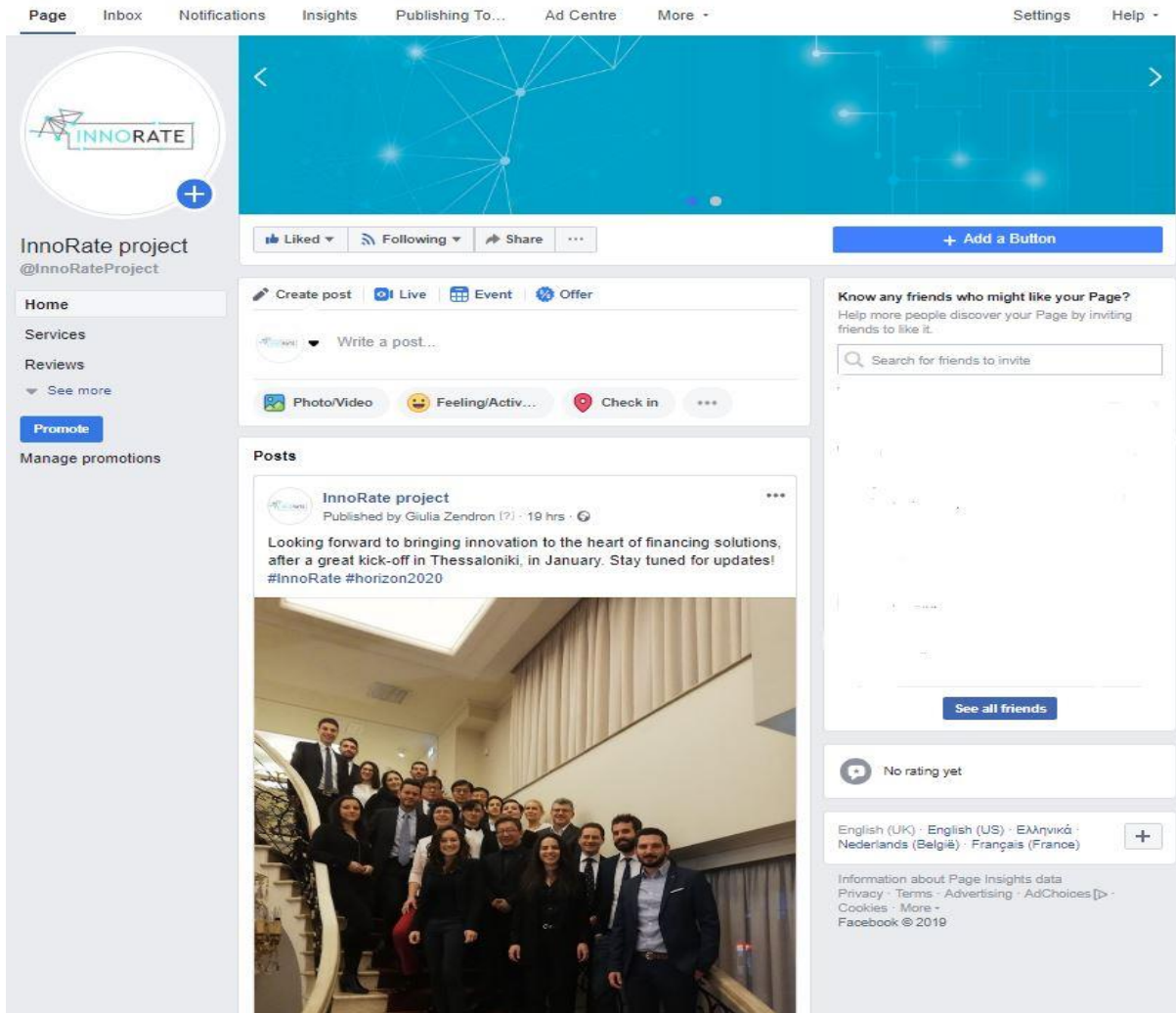


Figure 13: InnoRate's Facebook page.

It is important for the Facebook page to have a consistent flow of information. To achieve this, all partners are required to:

- contribute on a regular basis highlighting relevant news;
- 'like' the InnoRate page;
- 'like' the news and share them with their networks in order to maximise visibility;
- suggest/promote/invite other potential interested users to 'like' the InnoRate's page.

The metrics and insights that are provided by Facebook's analytics will be used to monitor the account's performance.

4.3.2 Twitter

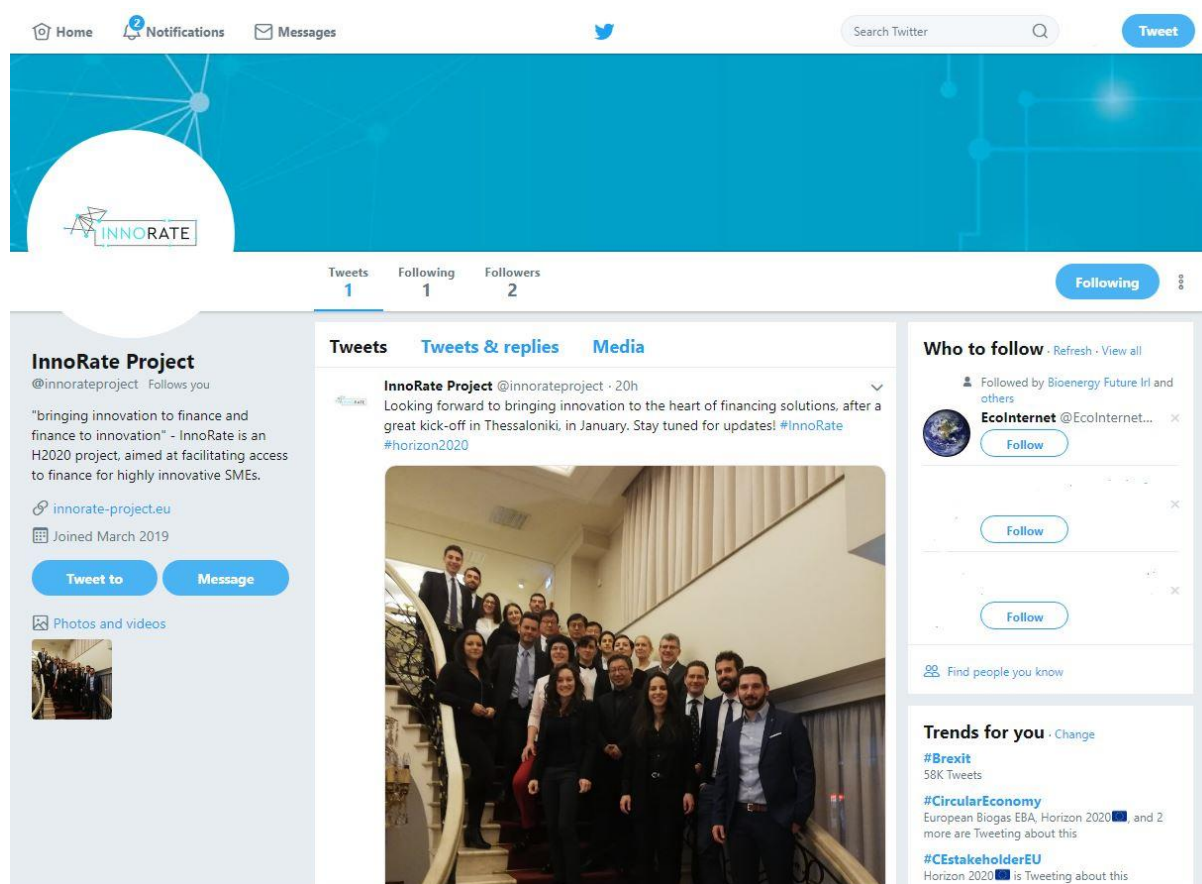


Figure 14: InnoRate's Twitter account.

A Twitter account was also launched (in M2) aiming to build another social community for conveying short messages to followers. Additional to other SMEs, Twitter is an extremely useful dissemination tool, especially during events that need to be publicised instantly. In particular, the use of hashtags allows our messages to reach a wider audience. In the context of InnoRate the Twitter account will act as a:

- **General dissemination and 'heads up' device** distributing links that will direct users to other project-related platforms/tools (e.g. InnoRate's web-portal, newsletter, InnoRate's service platform) and communicating information on project's progress (upcoming events, participation to external events, project results, etc.);
- **Newsfeed** platform collecting and updating news from other relevant projects and organisations;
- **Feedback platform**, a fast and easy contact point through which partners could receive queries and feedback from people.

Project partners are expected again to contribute on a regular. For monitoring the Twitter's account performance, the metrics and insights provided by Twitter analytics will be used.

4.3.3 LinkedIn

A LinkedIn account was also set up (in M2) in order to increase project's visibility within a more professional and institutional channel, which allows knowledge and experience exchange among professionals in the LinkedIn community. The LinkedIn page will be dedicated to showcase the project and its objectives, but also to group all InnoRate's partners under a single professional page where discussions and news/updates will be hosted.

Given the professional nature of this SMA, the LinkedIn page will be more project-focused, hosting content that is either directly related to the project (project's latest news, progress, upcoming events, etc.) or involving wider developments that are expected to have a direct impact on the project (e.g. important reports, changes in legislative frameworks, etc.). Finally, InnoRate partners should try to involve followers and third parties in an attempt to initiate professional and expert discussion on issues of common interest.

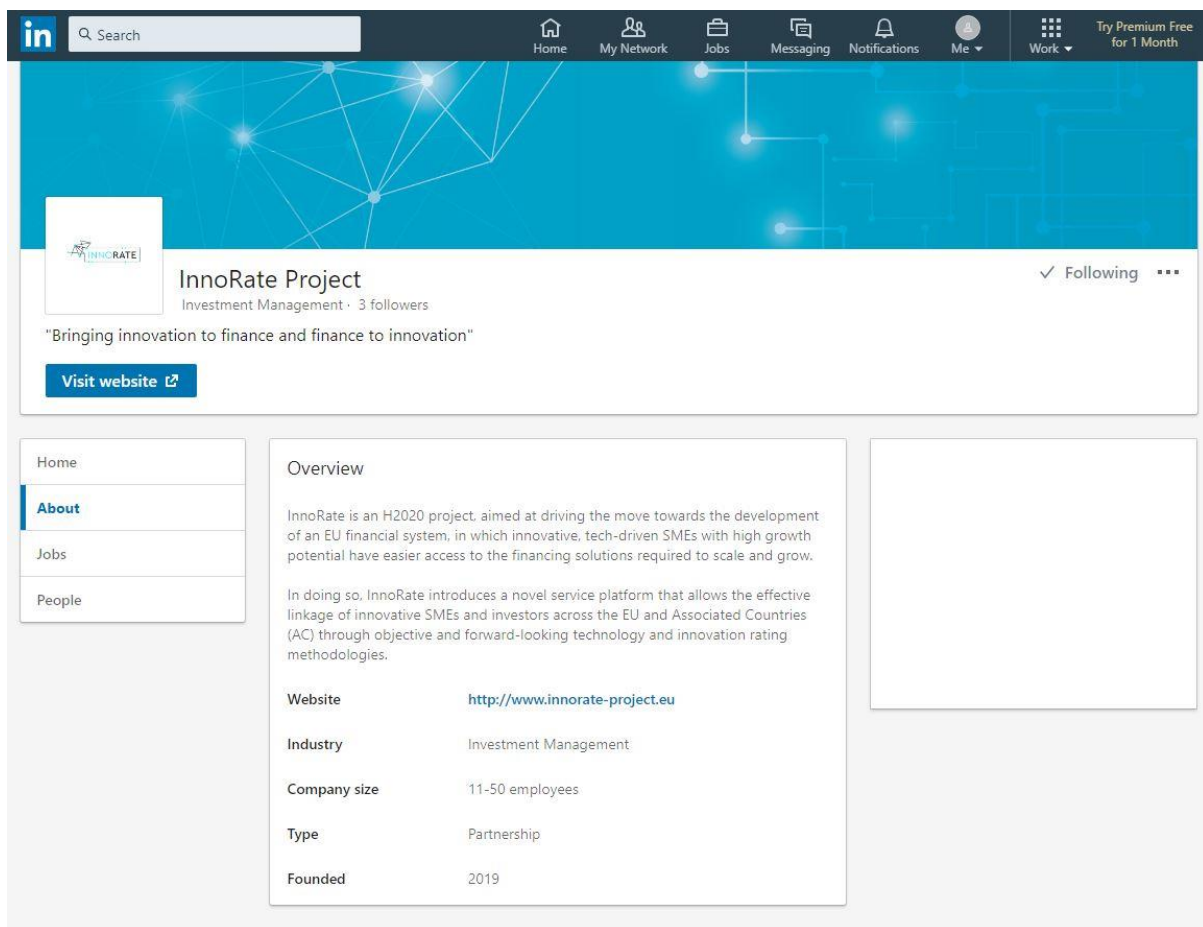


Figure 15: InnoRate's LinkedIn page.

The metrics and insights that are provided by LinkedIn will be utilised to keep track and assess the project's performance in this network channel.

4.3.4 YouTube

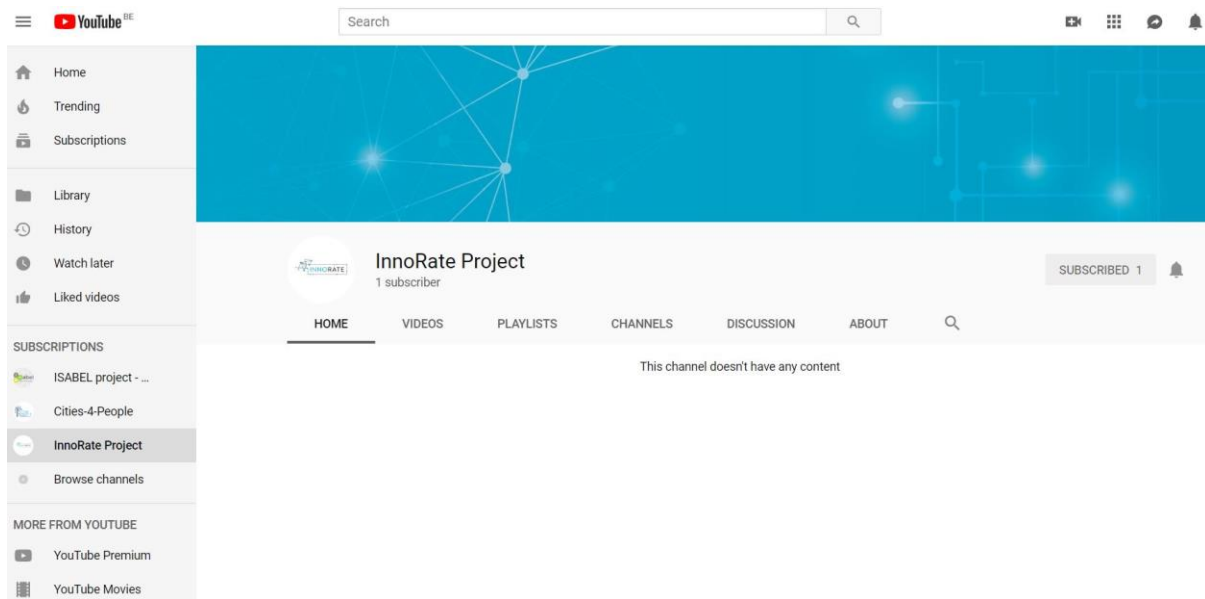


Figure 16: InnoRate's YouTube channel.

Finally, the InnoRate YouTube channel has been created (in M2) to gather all videos produced in a single and easily accessible location. However, the aim is not only to have a simple video archive but also to enhance the build-up of a strong online community, thanks to the connection with other similar channels and to further utilise the video capabilities in order to effectively promote project's activities.

The first InnoRate promotional video will be produced in M15 in order to raise awareness and exploit viral marketing effects. Overall the InnoRate YouTube channel will focus on presenting the project's actions and promoting the project upcoming events and results. Project partners are expected to contribute towards the production of the video and also to identify other relevant videos with a view to build up playlists in InnoRate's channel and sharing them with their contacts to maximise dissemination.

4.4 Events

4.4.1 Project events

In the frame of InnoRate, several events will be organised to serve the project's objectives and promote the project and its outcomes. In more detail, the following types of events are scheduled as part of the project's plan:

- **Co-creation workshop:** the InnoRate co-creation workshop will be organised by TTG in M6 with the support of all partners, engaging users and stakeholders in a series of co-creative activities to co-define the sectors and the specific pilot use cases on which the project should focus.
- **Validation workshop:** a dedicated workshop (in M8) with Advisory Board (AB) members and other stakeholders (e.g. stakeholders that were part of the co-creation workshop or any subsequent consultations) will be organised in order to discuss and validate the refined structure of InnoRate's Technology Rating System.
- **Training workshops:** a series of training workshops (physical or virtual) will be organized and will run with a view to better preparing innovative SMEs before they address prospective

investors and lenders in the framework of InnoRate's pilot operation. All innovative SMEs of the different pilots will be invited to attend and benefit from the workshops. Overall, we expect to deliver 8 training workshops with 15-20 innovative companies participating in each one. Complementary to the training workshops, 10 **webinars** will be organised to address a well-targeted list of topics covering generic, stage-specific and sector-specific content in line with the areas of focus.

- **Matchmaking events:** over the course of the project, two live investment fora will be organised bringing together 30-40 innovative companies and 30-40 investors/ lenders. In parallel, a series of online investment fora, we dub as **e-pitches**, will be organised bringing together (on average 10 per online event) innovative SMEs to pitch in front of a pool of active investors participating (10 to 15 per online event).
- **InnoRate policy workshop:** this event will be organised to share our experiences with relevant policy makers, funders and SMEs and to showcase how our TRS has succeeded in various conditions and operates in an objective and independent way, ultimately increasing their trust in our approach, services and tools.
- **Final dissemination event:** This event will be organised near the end of the project and will present the final results. The partner responsible for the dissemination and organization of the InnoRate's final event is White Research but all partners should contribute to further disseminate the final event through their personal networks.

The organisers of the abovementioned events are required to fill in a template (i.e. Event's Reporting Template) in which they will present the main dissemination action(s) that took place. This template was developed and shared with the consortium in M2.

4.4.2 External events and conferences

Participating in external events and conferences are unique opportunities to reach further audiences with a wide range of backgrounds. Throughout the duration of the InnoRate project, partners will participate in several external events and conferences with a view to:

- present InnoRate's concept;
- keep in touch with the latest advances;
- share knowledge;
- establish contacts and interactions with stakeholders;
- promote InnoRate's actions and results'
- overall raise awareness.

To ensure consistency in the presentation and communication of the project, partners will have at their disposal a common leaflet, a template for presentation slides, a poster, and a template for publications, all of which will incorporate the InnoRate's logo and colours. External presentations with the exclusive goal to present InnoRate should use this template and their content should be sent to Q-Plan and White Research at least 5 working days prior to the event. Partners should also comply with the InnoRate corporate colour scheme as appropriate.

Prior to their participation in an external event, the project partners should notify Q-PLAN and White Research in timely manner. After partners will have participated in an external event with a key role (e.g. presenter, discussant, co-organiser, etc.) they will have **to report the dissemination actions** that were carried out, by completing the aforementioned Event's Reporting Template.

4.5 Publications

During the project, all partners will produce press and media releases, articles in mass media, presentations in TV or radio, or other media. Aim of all these efforts is to increase the project's publicity and raise awareness by introducing InnoRate's actions to targeted stakeholders. All partners are responsible for identifying any publishing opportunities and for carrying out all necessary actions to ensure publications of project's assets and conclusions. As this will be an ongoing effort by all partners, and will depend on occasions that are hardly predictable at this stage of the project, this strategy does not foresee a minimum amount of non-scientific publications. However, we will keep track of published material through the Dissemination Reporting Template on a 6-month basis.

4.6 Synergies with other projects and initiatives

Communication with other similar regional, national and EU projects and initiatives will be established from the very early stages of the project implementation, aiming to not only create potential synergies, but also benefit from their experience and knowledge and maximise the impact of our communication activities in an efficient way, by leveraging multiplier and network effects. As such, actions under this channel will aim to create knowledge and awareness and to investigate potential common activities and ways for cooperation with a "win-win" perspective.

Collaborations with respect to joint dissemination activities (especially with relevant EU funded projects) will also be sought. This could take the following forms:

- Mutual reference of projects on respective websites;
- Mutual support through social media accounts;
- Exchange of news, invitations to external events, press releases and further dissemination actions through social media communication channels;
- Participation in events of similar projects;
- Explore possibility to co-organise event;
- Invitations to participate in InnoRate's events.

Other occasions for joint efforts may emerge during the project duration and will be described in the updated version of this document (M18).

A continuous communication pathway and synergies with complementary projects will be actively sought by Q-PLAN with the active support of all partners. The nature of the collaboration will be decided based on discussions with the representatives of the respective projects. Relevant projects and initiatives in which InnoRate partners already participate or have easy access to, may represent a first sample to be used for possible synergies. An indicative selection of such relevant key initiatives is briefly described below.

Project/Initiative	Brief description	End	Countries
INVITE	A core aim of INVITE is that of increasing the participation of private investors in innovative projects of SMEs with a view to stimulating the transformation of knowledge and ideas into marketable innovations with increased business and social benefits.	2020	Belgium, Germany, Greece, Luxembourg, UK
InvestHorizon	InvestHorizon addresses the main challenges affecting investment readiness across Europe with a view to maximising promising entrepreneurs' chances of successfully obtaining funding through training and direct access to key European investors.	2017	Belgium, Germany, Netherlands, UK

Project/Initiative	Brief description	End	Countries
Early Stage Investing Launchpad	ESIL is a Pan-European community aiming to improve angel investment market, stimulate cross border investment opportunities, find new deals, connect the most relevant networks and build a tailored training programme for local ecosystems.	2019	Belgium, Italy, France, Malta, UK
euBusinessGraph	euBusinessGraph represents a key initiative to simplify and disrupt the cross-border and cross-lingual collection, reconciliation, aggregation, provisioning and analytics of company-related data with the aim of enabling cross-sectorial innovation.	2019	Norway, Germany, Italy, Bulgaria, Slovenia, UK
ACTTiVATe	ACTTiVATe fosters cross-sectorial innovation among SMEs through a series of tailored services and activities such as one-to-one mentoring, brokerage events, investment readiness training workshops and investment forums.	2019	Netherlands, Portugal, Poland, Ireland, Spain, Belgium
CUBIST	CUBIST leveraged business intelligence to a new level of precise meaningful and user-friendly analytics of data by following a best-of-breed approach that combines essential features of semantic technologies business analytics and visual analytics.	2013	Germany, Bulgaria, France, UK
FET2RIN	FET2RIN facilitates collaborations for the take up of Future and Emerging Technologies projects by overcoming obstacles related to market acceptancy and accessing business leaders including entrepreneurs, early stage investors and crowdfunding communities.	2018	Belgium, Italy
MULTISENSOR	MULTISENSOR aimed at enabling users (e.g. SMEs, entrepreneurs, etc.) to interpret, relate and summarize economic information and news items using sentiment, social and spatiotemporal methods.	2016	Bulgaria, Germany, Greece, Spain
ACE Creative	ACE Creative aims at harnessing the strengths of innovation multipliers to accelerate creative industry growth through an integrated ecosystem of support in finance, market access and technology exploitation.	2016	Belgium, Germany, France, Italy, Luxembourg, Denmark, Netherlands, Slovakia, Spain, UK

Table 2. Indicative list of relevant key initiatives for potential synergies

The InnoRate partners also aim to participate in events organised by the European Commission or other EC funded projects (participation in Horizon 2020 and other EC events) and will try to exploit corresponding synergies. To this end, the project will also participate in liaison and clustering activities with relevant EU funded projects.

Overall, the InnoRate consortium acknowledges that its dissemination strategy cannot reach its full potential unless collaboration with similar projects is established. Therefore, the project partners will continuously identify such projects/initiatives and provide necessary data, including the key-persons to be contacted (i.e. coordinators and/or dissemination managers) in order to investigate opportunities for potential synergies and coordinate actions. All efforts in this direction will be described by the respective partners in the progress reports that will be prepared at the end of each project semester.

5. Monitoring, evaluation and reporting

5.1 Monitoring and evaluation

The implementation of dissemination strategy will be monitored on an on-going basis according to the level of realisation of set up dissemination objectives and outcomes. The frequent evaluation of dissemination actions will allow us to monitor and measure their impact and, if necessary, adapt them in order to increase the project's visibility and awareness. White Research is overall responsible for the monitoring and evaluation of InnoRate's communication and dissemination activities, although project partners are also expected to help, continuously monitoring/evaluating the publicity and communication actions they carry out.

Analytical measures and KPIs will be used in order to monitor and assess the impact of communication, awareness raising and dissemination activities. Some of the measurements we plan to employ for monitoring and evaluation are provided in the table that follows, together with our target values. However, these targets might be later readapted, based on the experience gathered or additional metrics may be also included. All these metrics will be documented in the updated version of the dissemination and communication plan (M18). Besides the quantitative metrics indicated below, we will try to gather qualitative data by eliciting feedback from stakeholders, on all occasions that allow direct contact with them (e.g. events organised or attended).

Assessed element	Metric	M18 Target	M36 Target
Website analytics	Nr. of visits (total)	3000	20000
	Nr. of unique users	1500	3000
	Avg. time spent in website (minutes)	2'	3'
	Nr. of pages viewed	6000	12000
	Bounce rate	50%	50%
	Number of newsletters issued	3	6
	Nr. of newsletter subscribers	200	1000
SMA analytics	Nr. of followers/likes (total)	400	>5000
	Nr. of posts (total)	350	700
	Promotional video	1 (M15)	1
	Nr. of views of promotional video	500	5000
Printed materials	Nr. of leaflet copies distributed	750	2000
Event analytics	Nr. of project events	2	22
	Invitations sent (total)	150	2000
	Attendance rate to project events (total)	40	480
	Exposure of InnoRate in external events (Nr. of events attended/total nr. of people ²)	10/2000	30/4000
Newsletters	Nr. of published newsletters	3	6

² Approximation based on event attendance, promotional material distributed, etc.

Assessed element	Metric	M18 Target	M36 Target
	Nr. of subscribers	300	>1000
Synergies	Nr. of joint actions with other projects	3	10
Stakeholders reached	Stakeholders reached from project actions ³	2000	5000
	Stakeholders reached from external actions ⁴	2500	5000
	Total stakeholders reached ⁵	4000	30000

Table 3: Impact indicators for dissemination and communication activities.

5.2 Reporting

Dissemination reporting is essential to ensure that we keep track of all the dissemination and communication activities that were carried out. Therefore, partners are expected to continuously report all their actions on a six-month periodic report (M6, M12, M18, M24, M30, and M36) and to contribute to the continuous monitoring of InnoRate's dissemination and communication activities.

In order to facilitate the reporting activities on each dissemination and exploitation action undertaken, three documents have been designed and shared with all partners. These include:

Annex	Dissemination Tool	Coverage	When
2	Dissemination reporting template	Include all dissemination activities which partners were involved in during the previous 6 months	Every 6 months
3	Event's reporting template	Each single event organised or in which partners participate	Within 30 days after any completed event
4	External Conferences and Events template	Any external conference/event relevant to InnoRate with potential benefit to attend	Throughout the project

Table 4: Monitoring and reporting tools for the dissemination and communication activities

During each project semester, all partners are expected to fill in the 'Dissemination Reporting template' (Annex 2) reporting all dissemination actions that they carried out during the previous six months.

For each completed event (workshop, conference, meetings, etc.), partners are required to fill in the 'Event's Reporting template' (Annex 3) providing information regarding the event that they were involved in. This template should be sent to White Research and Q-Plan within 30 days after the end of the event and the event should also be communicated to White Research and Q-Plan in advance for promotional purposes.

The "External Conferences and Events" is an excel file (Annex 4), that partners can fill in each time they identify an event (e.g. conferences, workshops, seminars etc.) relevant to InnoRate and in which

³ Organisation of events, project SMAs, project website, newsletter, surveys, interviews, etc.

⁴ Participation in external events, posting articles on external sources of information, etc.

⁵ This metric takes into account the total number of stakeholders who are reached any type of InnoRate dissemination action (i.e. both internal and external actions) and through all InnoRate communications channels (e.g. web portal, SMAs, events, publications, etc.).

InnoRate partners may be interested in participating to promote or present the project. The partners are supposed to share this document with White Research and Q-Plan.

Each project partner should immediately contact White Research in case any risks is identified with regard to communication and dissemination activities or if problems arise during the implementation of publicity actions.

6. Timeline and implementation plan

In order to ensure that the timing of the **dissemination and stakeholder engagement activities** is appropriate, we identify **four stages** during the project and beyond, as illustrated in the figure below.

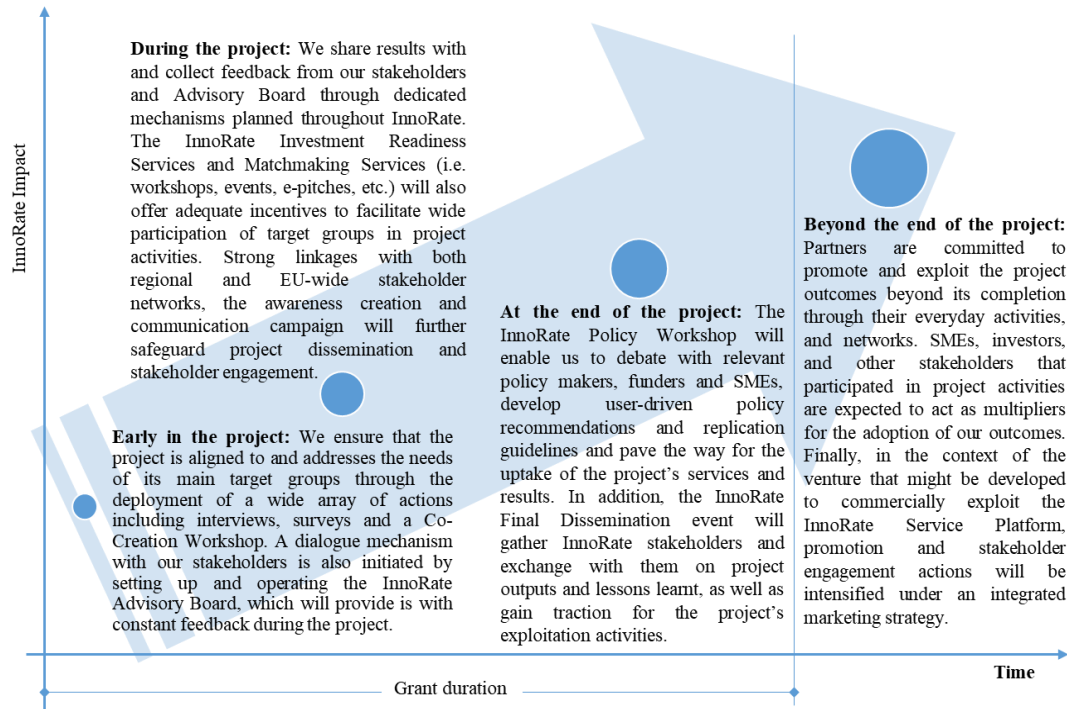


Figure 17: The four stages of dissemination and stakeholder engagement activities

Early in the project: we start to interact and collaborate with our users and stakeholders in order to reveal their needs through a wide range of activities, including **surveys, interviews and the organisation of the InnoRate Co-creation Workshop**. This will bring the selected representatives from our stakeholders and members of our Advisory Board together into **a series of co-creative sessions**. At the same time, valuable feedback from participants will be provided during the project.

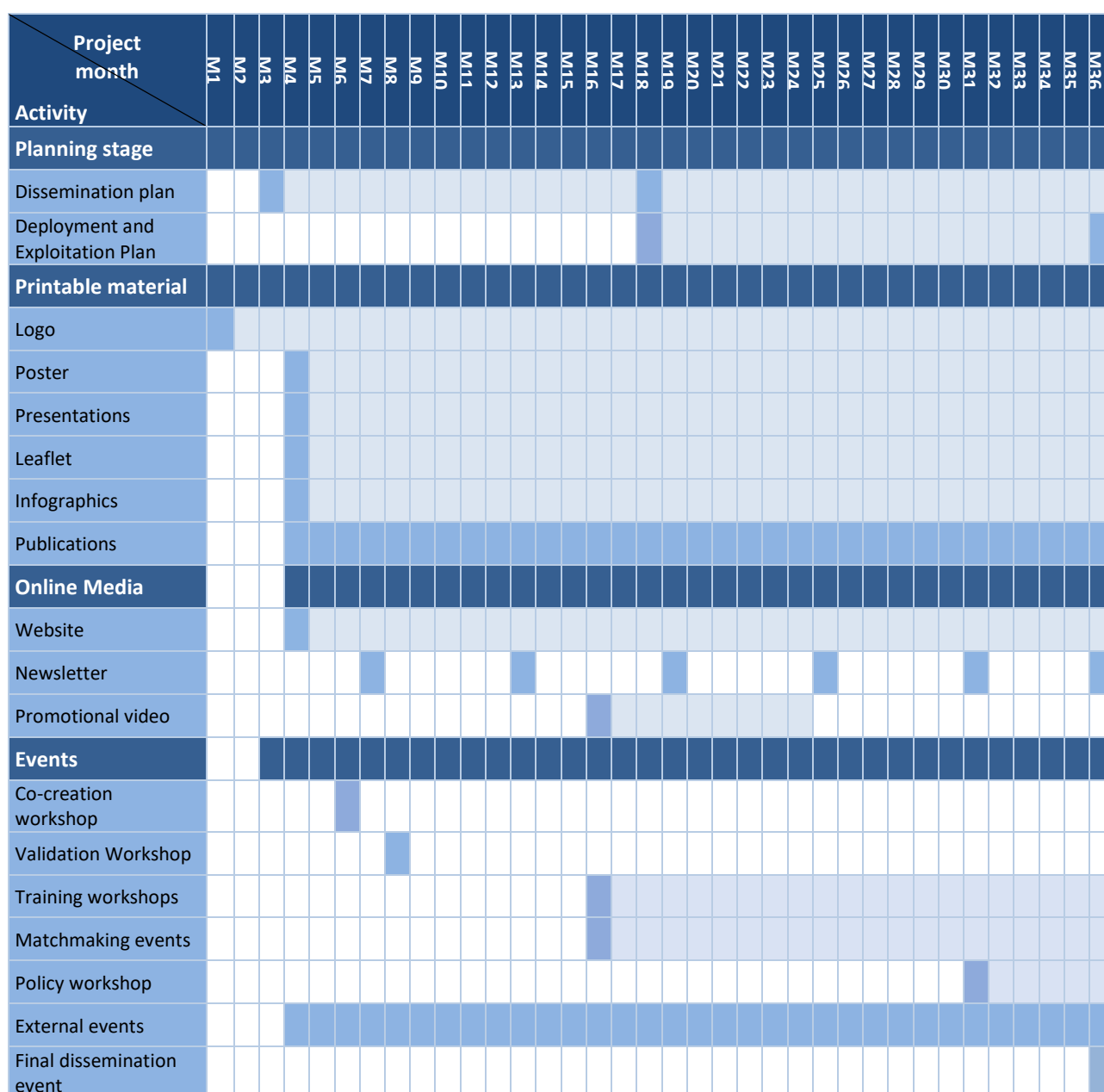
During the project: stakeholders and users will provide their constant feedback to help us fine-tune and customise our designs. Dissemination and engagement activities will be carried out by means of **workshops, events, e-pitches, etc.**, in the frame of **InnoRate Investment Readiness Services and Matchmaking Services**, attracting a wide participation of target audiences. At this stage, we will perform several other communication and dissemination activities in order to ensure awareness and wide participation. At the same time **we will employ the website and social media accounts to boost the online presence of the project** and we will leverage other projects and initiatives to **create synergies, link with regional and EU-wide stakeholder networks, and enhance the project visibility**. Further engagement to wider audiences will be pursued through publishing and presenting our results in **external events and conferences**.

At the end of the project: a dedicated **Policy Workshop** will be organised with a view to share our knowledge, results and experience with relevant actors (i.e. policy makers, funders, SMEs etc.) .This will create an environment to debate on how policy and decision makers can contribute to the creation of an environment with improved access to finance for innovative SMEs, by indicating user-driven pathways for their integration into current practices. Near the end of the project, **the Final Dissemination event** will be organised, aiming to gather all targeted stakeholders to showcase the projects achievements.

Beyond the end of the project: The continuous promotion of InnoRate and its outcomes, even beyond the project completion, is a key aspiration of the consortium. **All partners are expected to continue promoting the project outcomes through their everyday activities, networks and other means.** Key stakeholders (i.e. SMEs, investors, and other stakeholders), who participated in project activities, are expected to act as multipliers for the adoption of InnoRate's results. Finally, an integrated marketing strategy will be deployed through promotion and stakeholder engagement actions, with a view to commercially exploit the **InnoRate Service Platform**.

Table 5: GANTT chart of project's communication and awareness activities

Month of delivery
Further usage during the project



<div>Project month</div>	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	M13	M14	M15	M16	M17	M18	M19	M20	M21	M22	M23	M24	M25	M26	M27	M28	M29	M30	M31	M32	M33	M34	M35	M36	
Activity																																					
Social Media																																					
Twitter																																					
Facebook																																					
LinkedIn																																					
YouTube																																					
Synergies																																					
Monitoring & Reporting																																					
Report on Activities and Events																																					
List of ext. events																																					

7. Conclusions

A well designed and implemented Dissemination and communication strategy is essential for raising awareness on the project's concept and for exploiting its outcomes. This document aims to outline all planned communication and dissemination actions during InnoRate's lifetime, with a view to ensure the maximum visibility of the project, through a mix of communication channels and actions to engage with the identified stakeholder groups. Nonetheless, given the bottom-up, open nature of the project and its activities, the dissemination and communication plan will be continuously updated in line with the progress of the project.

An updated version of this Dissemination and communication plan will be delivered in M18 and will be based on the experience gathered during the first 18 months of the project. This will adjust the dissemination approach, where required, in order to increase and improve its outreach to the targeted stakeholders and better convey the project's vision to the European community and Associated Countries (AC) at large.

Annexes

Annex 1: InnoRate initial dissemination and communication guidelines for consortium partners

InnoRate Dissemination and Communication Guidelines

This document provides you with some key initial guidelines regarding communication and dissemination activities and introduces three main dissemination monitoring tools that you are kindly asked to use throughout the project.

Main guidelines

1. Actively contribute to the dissemination of project results and key messages.
2. Do not forget to include the InnoRate logo and website url together with the EU logo and the disclaimer “InnoRate has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 821518”.

In practice, it should look like this:



InnoRate has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 821518.

When displayed with another logo, the EU emblem must have appropriate prominence.

You can download the needed EU emblem in the desired resolution following this link: https://europa.eu/european-union/about-eu/symbols/flag_en.

3. If possible, follow the style guide concerning writing style, formatting options, numbers and currency, abbreviations and acronyms, captions, electronic cross-references, naming conventions, citation style. In general:
 - use CALIBRI as font for documents generated with MS Office programmes and for web applications. The preferred spacing is 6 pt. before and after paragraph, whereas the preferred line spacing is single
 - Always use the same style for references, both for in-text citations and in the bibliography/footnotes.
 - Be consistent in using currency references (for example, use EUR instead of € throughout).
 - Be consistent in the numbering format; comply with the British usage (e.g. 75,000,239.23), unless differently indicated by the bid manager.
 - If you abbreviate a word, use the correct abbreviation (for instance, “m” for million, not “mn”).
 - Make sure to introduce each abbreviation and acronym the first time you use it and create an abbreviation/acronym list at the beginning of the document.
 - Review the language and the coherence of the structure of the text you drafted.
4. Whenever possible, use the templates that will be provided to you, i.e. letterhead, presentation, publication. A leaflet and a poster will be prepared for you to use throughout the project. Other communication materials (e.g. infographics) will be prepared ad-hoc if needed.

5. Always inform WR and Q-Plan regarding every dissemination and communication activity that you plan to carry out (e.g. organisation of an event, articles on websites or magazines, participation in an external event, etc.). This will enable us to publicise it through the InnoRate communication channels in a timely manner.
6. You will have to report in detail all the dissemination actions you undertook (please see 0 InnoRate Dissemination Reporting Template for instructions. This template was sent to all partners by email).
7. Always report about meetings and events you organised and/or participated to (please see 0 InnoRate Event Reporting **Template** for an explanation on how to report about events. This template was sent to all partners by email).
9. Inform WR and Q-Plan about relevant events (e.g. conferences, workshops, seminars etc.) in which InnoRate partners may be interested in participating to promote or present the project. You will receive an .xls file named “InnoRate_External Conferences and Events”. All partners are kindly requested to fill in this specific .xls file, each time they identify an event relevant to InnoRate and share it with WR and Q-Plan.
10. In compliance with GDPR requirements, **always gather the consent, when collecting, using and storing personal data during events/conferences.**

The above mentioned points will be updated when necessary in order to be in line with the project's requirements and progress.

The InnoRate report “**Dissemination and communication plan**” (First version due in M3; Update in M18) will include these guidelines and will also outline the overall project's dissemination strategy and plan.

Dissemination monitoring tools

InnoRate Dissemination Reporting Template

This is an Excel file that has to be sent **at the end of each project semester to WR and Q-Plan**. All the information required must be provided – the European Commission collects all these data from the Communication Manager. Therefore, for each activity you will have to indicate:

- Date
- Place
- Type of activity
- Title
- Type of audience
- Size of audience per type of stakeholder group
- Countries addressed
- Your organisation's role
- Type of material used and quantity (e.g. number of flyers distributed, nr. of project presentations)
- Other partners or external organisation involved
- Short description of action and dissemination activities
- Other comments
- Relevant contacts made

InnoRate Event Reporting Template

The event report has to be sent after every event within **30 days** to both WR and Q-Plan. It is a structured file that includes:

- Event data (title, date, venue, organisers, type and number of attendants, duration)
- Goals and relevance within the project
- Organisation
- Dissemination activities
- Minutes of the events
- Outcomes of the event
- Evaluation
- Annexes (list of participants and scanned copy of the list signed by all participants, agenda, photos, presentations)

Website and social media use guidelines

Guidelines for enhancing InnoRate online presence

This section provides you with some key initial guidelines regarding your expected contribution and use of the InnoRate website and social media accounts (SMAs).

Website

1. Collect photos and videos for all InnoRate activities and share them with WR and Q-Plan, so as to make them usable on the website and on the InnoRate SMAs.
2. Actively contribute (if possible with 1 news item per month per partner) to the news section of the website. Please send each news item to WR.

A news item can be anything, like a link to other similar projects/activities, an article about a new regulation, a notice regarding a new policy or initiative, an article about an event etc.
3. Inform WR and Q-Plan regarding every event you organise or take part to for the purposes of the project (e.g. conferences, workshops, seminars etc.) and provide WR with a link to the event, so that it can be posted online in the dedicated section of the website.
4. Inform WR and Q-Plan about news articles (e.g. newspaper article, blogpost, TV interview etc.) mentioning your pilot area or the InnoRate project and provide WR with a link/scan for giving it more visibility online.

Social Media Accounts

1. Register for all InnoRate SMAs (i.e. Facebook, Twitter, LinkedIn and YouTube) and use them: monitor announcements and posts, comment, like and retweet.
2. Do make your own posts to foster discussion and keep the page alive.
3. Promote the InnoRate SMAs within your network of contacts.
4. Signal to WR relevant profiles that we could follow (on Facebook, Twitter, LinkedIn).
5. If you make a short video edit it so as to enhance the project identity (add the name of the project, the logo, the EU emblem and the disclaimer “This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no. 821518. The sole responsibility for the content of this video lies with the InnoRate project and in no way reflects the views of the European Union.”). WR will take care to upload it on YouTube.

The above mentioned points will be updated when necessary in order to be in line with the project's requirements and progress.

Annex 2: Dissemination Reporting template

The form below has been designed to help you keep track of any kind of awareness and dissemination activities. Just to remind you, dissemination activities include, but are not limited to, meetings, workshops, interviews, press releases, publications, e-mails, presentations, informal discussions, seminars, etc. Please, complete any relevant parts of the form below each time you perform a dissemination activity either this is small or large.

Important: Specify the type of activity as well as the type of the audience(s) addressed using the categories provided in the drop-down menu.

No. of Action	Date of activity	Place of activity	Type of activity (Choose one of the activity categories listed in the drop-down menu)	Title of conference, workshop, publication, website article, etc.	Type of audience (in case the action reached more than one type of stakeholders please describe this type in the line below. Use as many lines as necessary)	Size of Audience per type of stakeholder group (no. of persons per group)	Countries addressed	Role and description of your organisation's involvement (e.g. facilitator, interviewer, speaker, discussant, author, participant, etc.)	Type of project material used (e.g. InnoRate flyer, InnoRate poster, project presentation, etc.)	Quantity of project material used (no. of copies distributed per type of project material)	Other InnoRate partners or external organisations responsible / involved	Short description of the action as well as of the dissemination activities	Other comments (IF RELEVANT)	Significant contacts made IF RELEVANT (name, position, organisation; if consent to store and share data was given, add also address, tel, fax, e-mail)
1	Example 15/9/2019	Brussels, Belgium	Organisation of a conference	"Title of Conference"	Industry	42	Belgium (50), France (15), Germany (10), Spain (4)	Presenter, Powerpoint presentation of the C4P project	InnoRate Presentation	1	N/A	Participation to a conference organised by Organisation X in the thematic area of financing innovative SMEs. We participated as main presenters in a dedicated session. The InnoRate poster and flyers were also used during the event. Moreover, important contacts were made with	The participation in the event was successful since the project was introduced to important stakeholders.	1. Contact No. 1 2. Contact No2
					Scientific Community (Higher Education, Research)	15			InnoRate Poster	4				
					General Public	10			InnoRate Flyer	7				
					Policy Makers	12								
2	Example 10/10/2019	Greece	Non-scientific and non-peer-reviewed publication	"..."	General Public	1000	Greece	Writer of an article posted on an online newspaper (link)		N/A	N/A	Writer of an article that was posted on a well known Greek online newspaper (link)	The online newsletter is one of the most read websites in Greece.	N/A

Annex 3: Event's reporting template

Event's Aggregate Data

Title	
Date	
Venue	
Organisers	
Audience (number and type)	
Duration	

Event's goals, objectives and relevance with InnoRate

What were the key objectives of this event/activity? (e.g. to gather ideas, gather data, find new stakeholders, etc.). Was the event relevant to InnoRate? To what extent?

Organisation of the event

In case of organizing a project's event. For participation in external events do not complete this section.

How was the event/activity organized?

- What steps were taken to set up the activity/event?
- What was the location of the event and why was this area selected?

Dissemination activities

How was the event/activity promoted? Was project material used for promotion? Was the InnoRate project promoted during the event?

Structure of the event (short minutes)

Description of the event's sessions.

- What did the event/activity consist of?
- What tools were used? Why were these selected?

For participation in external events, please report what you did at the event.

Outcomes of the event

What information or data was gathered as part of this activity? (a brief summary of the information/data gathered is sufficient)

What ideas were generated? (brief explanations are sufficient)

Evaluation of the event

What are the main impressions and observation that you made?

- Were there any challenges with this event/activity?
- What were the key successes of this activity?
- If re-deploying this event/activity how will/would you do it differently?

ANNEX: Attachments

- The list of participants (if consent to store and share data was given)
- A scanned copy of the list of participants signed by each participant (if possible)
- The agenda of the event
- Photos
- Presentations (if applicable)
- Copies of materials used to promote the event (e.g. links to press releases, videos, posts, leaflets etc.

Annex 4: External conferences and events template

No.	Event's name	Thematic Focus	Abbreviation	Date	Location	Registration fees	Deadline for submission	Website	Specific requirements for participation (e.g. abstract submission, ...)	Added by (Partner)
1										
2										
3										