



SETTING UP A NATIONAL INFORMATION POINT OFFICE

Setting up, Development, and Operation of an NCP/NIP Organisation

Tbilisi 6-8/5/2009



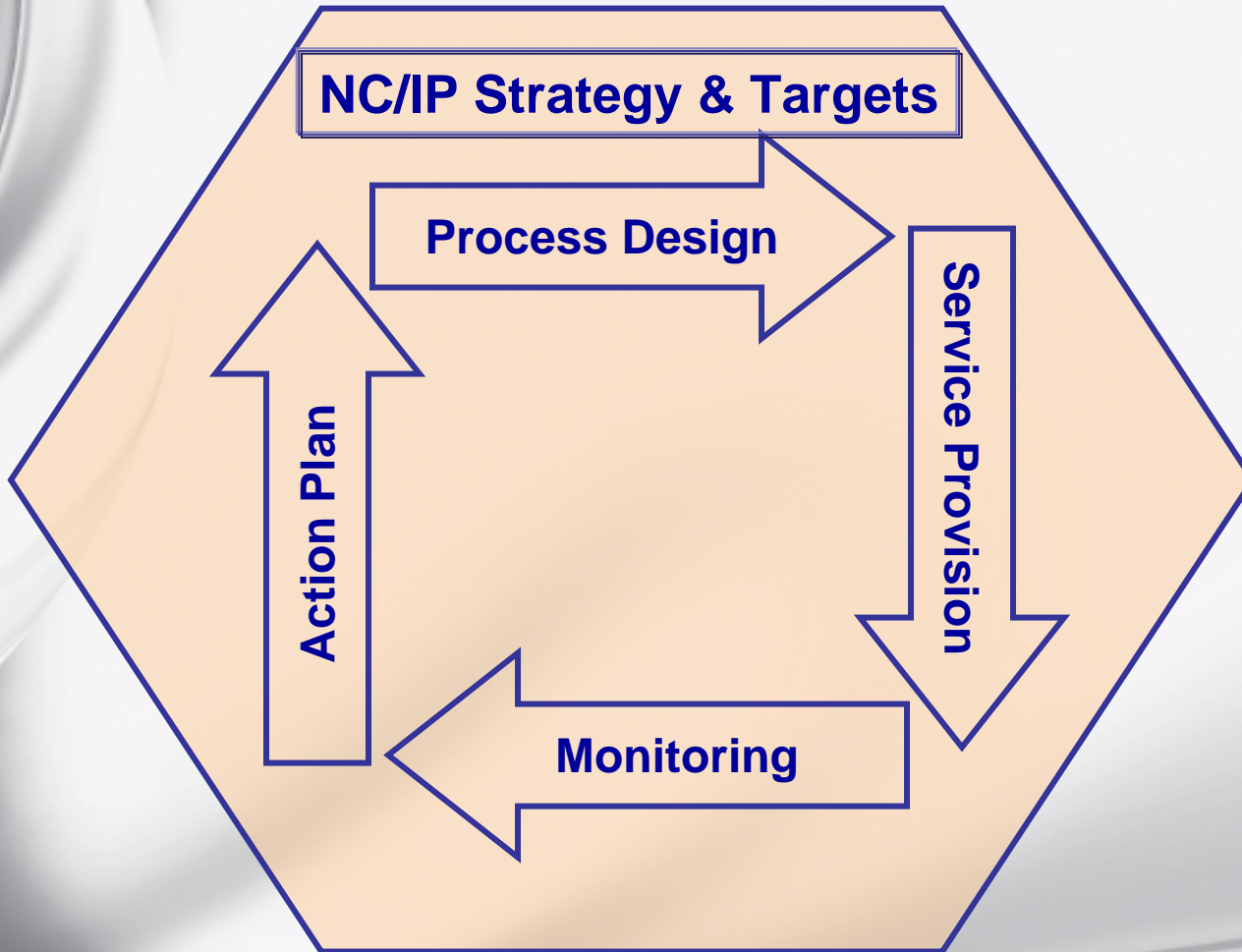


Organising an NCP/NIP for best performance

- 1. NIP Strategy (what the NIP wants to achieve)**
- 2. NIP Targets (tangible and intangible)**
- 3. NIP Character (what, how, with whom)**
- 4. NIP Environment**
- 5. NIP Action Plan**
- 6. NIP Process Design & Flow**
- 7. Process Monitoring**
- 8. Information Management System**
- 9. NIP International marketing**



NCP/NIP Modus Operandi





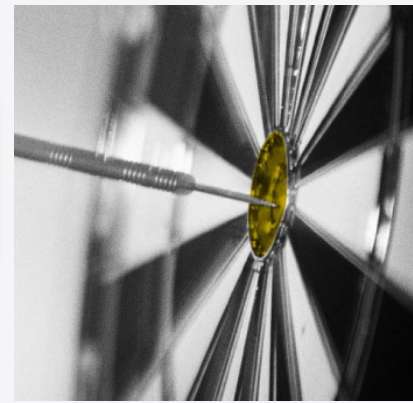
NCP/NIP Strategy



- **To maximise the benefits of the national participation (enterprises and Research/Academic Organisations) in the EU RTD programmes**
- **Financial benefits from the EU RTD programmes**
- **Experience obtained from the international character of the EU RTD programmes (experience for the participants and the national authorities)**



NCP/NIP Targets



- **Tangible targets**
 - **National contribution / funds imported - recovered**
 - **Number and size of successful participations**
 - **Identification of thematic priorities of national importance and advantage**
- **Intangible targets**
 - **Promotion of international cooperation mentality**
 - **Introduction to the EU procedures**
 - **Strengthening the R&D – Industry & Society link**



NCP/NIP Character

- **Public welfare service (Yes/No or both AND why) ?**
- **Information Centre (where it starts & where it ends) ?**
- **Assistance & Advice provision (by whom, how much) ?**
- **Added value services (consultancy)?**
- **NIP Profits/Gain (direct/indirect) ?**
- **Full time job ?**



Define your limits:

Information

Mediation

Consultancy



Mapping the NCP/NIP (National) Environment

External

- **Recipients/"customers" (organisations and firms) recording & classification (thematic and economic)**

Internal

- **Identification of priorities / pilot customers (technology producers and users)**
- **Organisation and continuous training of network of NCP/NIP partners and NCP/NIP multipliers**
- **Assignment of responsibilities and distribution of tangible targets and anticipated results**



NCP/NIP Action Plan

- **Customers database: Recording academic and research units, enterprises, consultants, public and regional organisations – technology users, etc.**
- **Services development**
- **Awareness activities**
- **Contact activities**
- **Assistance activities**





Customer portfolio: customer profile

- **Organisation Name and contact details**
- **Person in charge and position**
- **Status (state, private, research, education)**
- **Organisation Activity, classification**
- **Areas of expertise (classification)**
- **Areas of interest (classification)**
- **Availability for international cooperation**
- **Relativity to FP7 priorities**

- **Technology audit data**



Services to customers

- Information on FP7 structure and rules of participation
- Information on FP7 calls for proposals
- Preparation of (outward) partner searches
- Retrieval and dissemination of (inward) partner searches
- RTD proposal drafting (from advice to consultancy)
- Information Days / Brokerage Days
- Training seminars on RTD proposal preparation
- Monitoring of proposal progress
- Assistance in negotiations with the EC services (GPF forms)
- Assistance in consortium agreement drafting
- Technology Audits
- Technology Watch & NoveltyCheck (IPR & Innovation check)

...



Awareness activities

ACTIVITY DESCRIPTION	“INPUT”	“OUTPUT”
Publications Dedicated Newsletter in Newspapers in magazines in Internet	No of recipients No of publications No of articles No of pages/sites	Number of responses * Number of responses * Number of responses * Number of visitors
Mail / Fax / e-mail campaigns / individual	No of campaigns / recipients (broad, targeted, sectoral campaigns)	Number of responses for additional information, new registration to the NIP database
Event Organisation	No of events No of invitations No of (pre)publications No of participants	Number of responses for additional information, registration to the NIP databases, post event publications
Participation in exhibitions / fora	No of stand visitors No of stand visitors	Number of responses for additional information, registration to the NIP dB

** Number of responses for additional information or registration to the NIP databases (dB)*



Contact Activities

ACTIVITY DESCRIPTION	“INPUT”	“OUTPUT”
Telephone Calls	No of calls per month, per thematic / horizontal programme	No of requests for additional material , for appointment for registration to NIP database
Access to specialized databases, e.g. CORDIS	No of accesses (own and on behalf of customers)	No of partner search profiles recommended to customers
Visits to and from customers (RTOs & firms)	No of visits, duration of visits, new registrations	Identification of potential projects for RTD cooperation
Training Events and seminars	No of Events No of invitations No of publications No of participations	No of new registrations No of requests for further assistance



Assistance & Advice Activities

ACTIVITY DESCRIPTION	“INPUT”	“OUTPUT”
Diagnostic Visits	No of visits No of technol. problems addressed No of research skills identified	No of RTD projects proposed, No of partner search mandates
Partner Searches (PS)	No of outward PS, No of inward PS disseminated	No of Expr. of Interest (in), No of Expr. of Interest (out), No of consortia formed / proposals submitted
Brokerage Events	No of events, No of national profiles No of foreign profiles	No of bilateral meetings, No of matchings No of agreements No of proposals submitted
Support in RTD proposal submission	No fo customers requesting assistance in RTD proposal drafting, negotiations, No of customers supported	No of submitted proposals No of successful proposals No of organizations in successful proposals



Design of Processes

Information Stream

- FP promotion
- Customers training on FP
- Call monitoring
- Call promotion
- Call results monitoring

Mediation Stream

- Customer attraction
- Project / Profile Identification
- Clarification of terms
- Search drafting (outward)
- Utilise NCP/NIP tools
- (Inward) PS retrieval
- Dissemination
- Matching

Advice Stream

- Proposal preparation
- Progress monitoring
- Negotiations with EC
- GPF preparation
- “After sales” services



Process Design: FP Promo & Customer training

- Familiarisation of the NCP/NIP staff with the FP documentation
- Continuous training of the NCP/NIP staff (EC Info days)
- Production of FP documentation in local language
- Preparation of electronic and print publications on FP

- Organisation awareness campaign through info events
- Training seminars with hand-on exercises
- Person to person advice by experienced NCP/NIP staff




Process Design: Call monitoring & promotion

- Workprogramme observation for Roadmap of Calls for Proposals
- Cooperation with National Representatives in Programme Committees
- CORDIS monitoring for new Calls
- Dissemination campaigns for specific Calls (direct contacts, events, newsletters, use of electronic means), with respect to the deadlines !
- Identification of interested parties and marketing strategy for Call promotion
- Monitoring of Call results in view of the NIP targets (National participation in the Call, distribution of participants, statistics / revision of targets for next call in the same programme)




Process Design: Customer attraction

- **Website (classified calls, RTD proposals, FAQ)**
 - **Call presentation and promotion – on time**
 - **Training seminars on specific technicalities (e.g. budget)**
 - **Organisation and participation in brokerage events**
 - **Dedicated Newsletter**
 - **Visibility assessment**
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- **Integration in the NIP information management system** 



Process Design: project / profile identification

- **From previous participations in RTD projects-
national, international**
- **From established Universities / RTOs**
- **From Industrial Federations / Chambers / Sectoral
Associations**
- **From investment institutions**
- **From personal contacts**
- **From previous Information campaigns (events,
infodays)**
- **Integration in the NIP information management
system** 




Process Design: Clarification of terms

- **Charter of NIP Services (what we CAN DO and CANNOT DO, obligations of parties, confidentiality issues). Provision of services under contract (regardless the charging policy)**
- **Detailed service description (novelty check, PS profile draft, active outward search, incoming PS scanning, assistance in proposal drafting following the formation of a consortium)**
- **Integration in the NIP information management system**





Process Design: PS preparation (outward)

- **Check current inward PS portfolio (IMS necessary)**
- **Check other inward PS (CORDIS and other sources)**
- **Client reliability check* – before the active PS promotion**
- **Securing customer commitment**
- **Drafting the Partner Search (PS) – following the standards**
- **Submission of PS in the cooperating networks (NIP/NCPs, etc)**
- **Integration in the NIP information management system** 



Process Design : Use of NCP/NIP network & tools


for inward PS promotion and outward PS identification

- **CORDIS (Partners, Projects, Results, e-alert, EoI)**
- **Other BBS systems**
 - www.rdpartners.net
 - www.ideal-ist.net (IST)
 - www.fz-juelich.de/ptj/Partner_Search/ (NMP)
 - ...
- **National & international NCP BBS systems , NCP/NIP mailing lists**
- **Integration in the NIP information management system**






Process Design : inward PS promo to local clients

- **Dissemination through Web / Internet / automatic matching tools**
- **Targeted dissemination through classified lists**
- **Printed dissemination through NIP Newsletters**
- **Publication of selected PS in the press**
- **Dissemination of thematically grouped PSs to federations, associations and sectoral groupings**
- **Integration in the NIP information management system** 



Process Design: Matching – making of a consortium

- **Following an Expression of Interest (EoI) for a PS, the role of a NIP/NCP is rather limited**
- **Keeping the other NIP/NCP informed is a must**
- **Nevertheless, the NIP/NCP can and should assist his client and facilitate the communication between the interested parties, if this is delayed, obstructed or even interrupted – in close cooperation with the other NIP/NCP**
- **Integration in the NIP information management system** 



Process Design: Proposal preparation

- **Advice in the non thematic content of the proposal**
- **Advice in topics as such “socio-economic impact of the project”, “relevance to the programme objectives” – always bothering the proposers – is extremely useful**
- **Advice on project management and contingency plans**
- **Advice and recommendations on consortium suitability and balance**
- **Advice on the dissemination plan**
- **Advice on the results exploitation plan & IPR issues**
- **Advice on project budget**
- **Checklist / proof reading**



Process Design: Proposal progress monitoring

- **Close cooperation with National authority (not just once per year for review)**
- **Frequent communication with the EC Programme NCP coordinator**
- **Close cooperation with the other NIPs/NCPs indirectly or directly involved in the proposal**
- **Evaluation Summary Report: a learning tool**



Process Design: Contract preparation / Negotiations

- **If the proposal is provisionally accepted ...**
 - **Amendments in the proposal may be required**
 - **Budget revision may be requested**
 - **Partners roles may have to be reassigned**
 - **Consortia clustering may even be recommended by the EC**
- **If the proposal is finally accepted ...**
 - **Complicated Grant Agreement Preparation Forms have to be completed**
 - **Consortium Agreement (check list available)**
 - **Management advice may be needed during the project duration**
 - **Clarification of several point with the Commission services**



Monitoring of Targets, Activities, Processes

National Information Point - Coordination



**Target
Input/Output**



Multipliers (NIP partners)



Outcome
Input/Output

Management & Performance Indicators

**Amendment or revision of targets / assignments
at frequent and pre-defined time intervals**



Definition of Management Indicators

RTD Proposal	A research proposal (to be) submitted for funding in an FP programme
RTD Consortium	An international consortium formed to submit a RTD proposal
Partner Search	A search for partnership in a RTD proposal to be submitted for funding
Event	An event with international participants, e.g., brokerage event, mission, etc. with the objective to establish RTD consortia
Meeting	A transnational one-to-one meeting between your NCP/NIP client and an external NCP/NIP to discuss a particular RTD PS
Local RTD PS	RTD Partner Search proposal produced by your NCP/NIP
External RTD PS	RTD Partner Search produced by an external NCP/NIP
Local RTD PS published	A local RTD PS disseminated to the NCP network, through BBS and/or event catalogues, etc.
External RTD PS processed	An external RTD PS promoted to your local client through various means
EOIs in local RTD PS	Total number of Expression of Interests from other NCP/NIP external clients in your local client's RTD PS
EOIs in external RTD PS	Total number of Expression of Interests from your local clients in external RTD PS
Clients	Total number of local clients (new and existing) that have received assistance in the RTD consortium formation



Performance Indicators

Overall Results:

An NIP/NCP total output

RTD consortia or proposals / # Targets or #FTE

Successful RTD consortia / # Targets or #FTE

Funds from successful RTD proposals / Targets or # FTE

Efficiency in getting clients to negotiate:

Efficiency of the work put in to get clients to start talk with one another

Negotiations started / #FTE

Negotiations started / #Total EOIs

Matches / # FTE# Matches / #Total EOIs

Efficiency in events:

Efficiency in organising events, such as TTT-days, brokerage events, Technology missions, etc

Meetings with matches / # Meetings

Local RTD PS profiles in events / # FTE

Meetings / # Local RTD PS profiles in events

Efficiency in PS processing:

Efficiency in producing/promoting local PS profiles and promoting external PS profiles

Local RTD PS profiles published / # FTE

External RTD PS profiles processed / # FTE



Information Management System

- **The vital tool for the monitoring of activities, allocation of tasks between NIP staff and associated partners (multipliers), provision of effective services, evaluation and measurement of performance is ...**
- **an integrated Information Management System**



International Marketing

- **Uploading national thematic NIP structure in CORDIS, to ensure:**
 - Access to all info available to formal NCPs/NIPs
 - Visibility to partner enquiries from abroad
- **Utilisation of the contacts of “INCO” projects**
 - Make good use of the “club” spirit
 - To be remembered when opportunities arise
- **Utilisation of the NCP-networks CA projects**
 - For partner searching, training* opportunities, best practices, inside information
- **Initiate/participate in twinning schemes, staff exchanges**