Best Practice Handbook

for FP7 SSH NCPs

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Best Practice Handbook
for FP7 SSH NCPs
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1. Introduction

The objective of this handbook is to provide information and practical advice on the daily work of a National Contact Point (NCP) within the EU's 7th Framework Programme (FP7), in particular within the theme of socio-economic sciences and humanities (SSH). It is the result of extensive cooperation under the network of FP7 SSH NCPs under the NET4SOCIETY project where it constituted a deliverable in Work Package 2. A number of NCPs have contributed to this publication during the lifetime of the project, from the initial questionnaires for assessment of good practices and training needs, which resulted in the first draft of this handbook, and all the way through to the final product.

The handbook is not meant to be authoritative nor exhaustive in terms of the duties and tasks that need to be performed by an NCPs, but rather to provide an overview of the most common tasks and challenges in the work of an NCP and hopefully to achieve the objective of communicating and sharing the experience and good practice with the network. It is then for each NCP, newcomers as well as more experienced ones, to pick and choose the elements that they think are relevant for their daily work. To facilitate the use of this book, the text is accompanied by practical and user-friendly checklists, provided in Annex 3, which can be used directly or printed out individually.

The structure of national FP7 NCP systems exist in various forms, from highly centralised to decentralised structures and the organisations that run the NCP work range from ministries, public research councils, governmental agencies, universities and research institutions to private companies and consultancies. This means that the actual persons that have to role of NCP work in all kinds of environments and their working methods vary accordingly. At the outset of FP7, the European Commission decided, in order to provide a unifying element to the NCP work, to issue a document providing the frame and basic requirements for setting up NCP systems at national level. This document, *Guiding principles for setting up systems of National Contact Points (NCP systems)* can be found on the CORDIS website (see chapter 2).

Although the national NCP systems vary, there are a number of common tasks, outlined in the *Guiding principles,* that most NCPs undertake in their work. Most are compulsory, even though all the main tasks mentioned are carried out by the majority of NCPs. The recommended tasks are promotion and awareness raising, providing information about the Framework Programme; advising and assisting applicants when preparing their proposals and providing them with training in order to understand the programme better; and not least, the NCPs are an important link between the European Commission and the national research community, communicating with researchers as well as signposting and giving feedback to the Commission regarding implementation of the programme in their countries. The content of this handbook is focused on those activities that are most common for all NCPs.

The editor wishes to thank all members of the task group for an excellent job, as well as additional NCPs that contributed to the publication. Special thanks to Melanie Büscher, the Danish SSH NCP, who edited the draft handbook and to Elisabeth Thompson, the Austrian SSH NCP, who took over the leadership of the Work Package, and to the friendly coordinator's team from DLR, Germany, that led the network from the day it set sail in Köningswinter in 2008 and created the extraordinary spirit of teamwork and collaboration that affected all network members in a positive way throughout the lifetime of the project and onwards until the end of the 7th Framework Programme. It is the sincere hope of the editorial team that the handbook will be useful to you in your daily work!

Adalheidur Jónsdóttir | Rannis, Iceland

2. Socio-economic Sciences within FP7

2.1 General Information about the Programme

The European Union's 7th Framework Programme is comprised of various sub-programmes with specific objectives which are grouped together under four main categories: **Cooperation**, **Ideas**, **People** and **Capacities**. The largest category, Cooperation is divided into ten programmes based on thematic fields and objectives. For each type of objective, there is a specific programme corresponding to the main areas of EU research policy. One of those is Socio-economic sciences and humanities, which provides funding for research in the corresponding areas of science. Each area contains specific fields that constitute the proposed research topics further specified in the annual Work Programmes and issued Calls for Proposals.

The programme emphasises the following eight areas:

1. Growth, employment and competitiveness in a knowledge society:
   - innovation, competitiveness and labour market policies;
   - education and life-long learning;
   - economic structures and productivity.
2. Combining economic, social and environmental objectives in a European perspective:
   - models within Europe and across the world;
   - economic and social and cohesion across regions;
   - social and economic dimensions of environmental policy.
3. Major trends in society and their implications - demographic change, reconciling family and work, health and quality of life, youth policies, social exclusion and discrimination.
4. Europe in the world - trade, migration, poverty, crime, conflict and resolution.
5. The citizen in the European Union - political participation, citizenship and rights, democracy and accountability, the media, cultural diversity and heritage, religions, attitudes and values.
6. Socio-economic and scientific indicators - the use and value of indicators in policymaking at macro and micro levels.
7. Foresight activities - the future implications of global knowledge, migration, ageing, risk and the emerging domains in research and science.
8. Strategic activities - including research for policy support and international cooperation.

2.2 Sources of Official Information

CORDIS

The CORDIS (Community Research and Development Information Service) website is the official portal where researchers can find European Commission information covering all areas of the Framework Programme. CORDIS has information on R&D calls, researchers looking for partners, European R&D programmes and policies, European R&D projects, European R&D call results, official documents, publications and statistics.

Information about the main FP7 activities are published on the CORDIS website, namely the events organised by the Commission, the open calls for proposals, and the relevant guides for preparing and writing a proposal. CORDIS has information on all themes within the four FP7 areas (Cooperation, Ideas, People, Capacities).

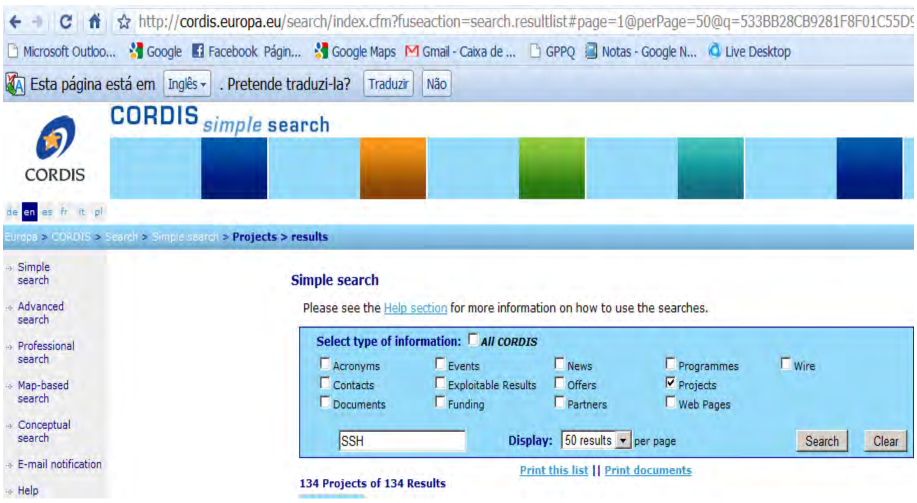
The CORDIS FP7 website: http://cordis.europa.eu/fp7

There are dedicated Socio-economic Science and Humanities pages within CORDIS, which contain highlights of the SSH unit activities including SSH relevant publications, SSH theme activities, SSH specific events or information sessions, and other SSH relevant information.

It is important to keep your clients informed of the latest SSH relevant events.

Calls for Proposals

Information about all calls; open, closed and forthcoming, is available on the CORDIS website. CORDIS contains all the documents needed to prepare an FP7 proposal, You can download call specific information packages with the work programme, the call fiche, and guidance documents for the different funding schemes, such as collaborative projects (CP) or coordination and support actions (CSA).



CORDIS database

The novelty of a research concept within a proposal is an important factor for success. The SSH theme in FP7 adapted a “New Approach” in 2008. The new approach has a recommended framework for research projects which includes stocktaking, communication and foresight as core elements which must be incorporated into all proposals.

CORDIS has an important database of projects funded so far in all areas of FP7, in previous Framework Programmes as well as in other EC programmes. This is a useful resource for applicants, as they can examine the projects which are already established within the activity areas. Researchers can use this database of funded projects to assess the “state of art” within the activity areas, and check the possible added value their proposal can bring to the theme. There are several options for effective projects search:

- Simple search
- Advanced search
- Professional search
- Map-based search

The information available in CORDIS is complemented by the DG-RTD Website on Socio-economic Sciences and Humanities.

DG-RTD website

The Science, Economy and Society Directorate (Directorate L) publishes its information on the DG-RTD website, a site which is also linked to CORDIS and to open calls and work programmes. Information on concepts such as stocktaking and foresight which are integral to the new approach is available here.

It is also possible to check previously funded SSH projects as far back as the Fourth Framework Programme (FP4) and the ongoing research activities of the work programme and trends in socio-economic sciences and humanities research. The website is also a source of information for future research and forward looking activities mainly related to the ERA and European 2020 Strategy.

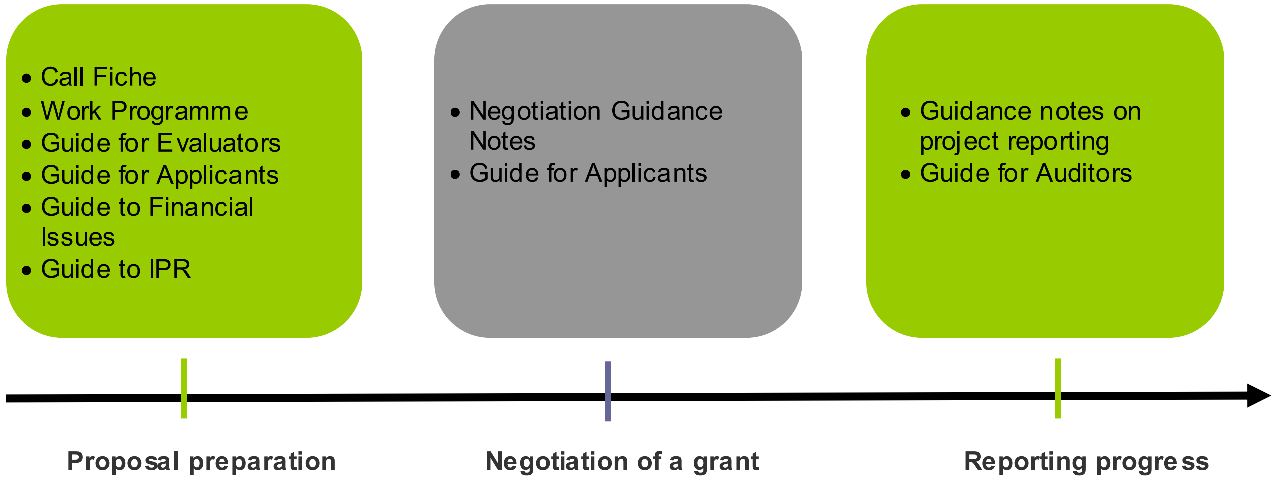
The SSH work programme funds EU policy relevant research. Successful SSH proposals have direct policy relevance to the call topics. Thus, it is important that applicants are fully aware of the policy briefs, policy reviews, databases, research achievements, and the e-Library publications relevant to their research area, both in the scientific and political fields.

FP7 project management sources

CORDIS website

When a project is successful in securing funding, the information material describing the legal parameters of funding are available on CORDIS. On the “find a document” link, it is possible to search for the rules of participation and the legal basis of the four FP7 programmes and EURATOM. The legal documents required to obtain funding, the general model grant agreement and all its annexes, are available for downloading. These documents are the official guidance documents neede in any successful project, from the negotiation guidelines to the guide for financial issues and the reporting guide. The figure below provides an overview of available documents from application to reporting.

Documents available on CORDIS for FP7 from application to reporting:



EPSS and the Participant Portal (SESAM and FORCE)

FP7 applications and project reporting is completed through online tools. The Electronic Proposal Submission System or EPSS is the only portal through which an application can be submitted. When the European Commission provides funding and when funded projects report to the Commission, all the steps are completed via the participant portal, which collects all information relating to the partners and their projects (this is centralised by PDM-Project Data Management).

Online tools for FP7 project management:

The research participant portal website works as document repository on NEF (Negotiation Facility) and as a reporting tool with SESAM for scientific and technical reports, and FORCE for financial reports. The participant portal also works as institution data portal where the LEAR (Legal Entity Appointed Representative) can update information about the institution.

NET4SOCIETY website

The NCP network NET4SOCIETY has a website with lots of useful information and tools for SSH NCPs. Information on SSH events, workshops, and trainings is collected an made available. There is a partner search tool available to disseminate profiles among potential proposers and a research directory where researchers can search for partners. The website library includes Commission publications with SSH relevance. In the event calendar, all SSH NCPs can enter their national information days and international events. All SSH NCPs' contact details are listed in the members' section. The NET4SOCIETY website thus does not only serve as a website for the project, but is also an important communication tool, facilitating exchange of information, of working documents and news between SSH NCPs.

Other sources of information

There are many other networks that influence the SSH work programme, from the Advisory Group to the Programme Committee members. These networks can be useful sources of information for NCPs. Following is a list of some of the main active SSH networks and other relevant information sources:

- CIRCA – (Communication and Information Resource Centre Administrator) is a repository of documents used by the European Commission to communicate with Programme Committee members. NCPs, that have not been nominated as PC members or specialists, can still get limited access to CIRCA, via the national NCP coordinator.
- METRIS – (Monitoring European Trends in Social Sciences and Humanities) is an expert group established by the European Commission that has the role of identifying important new and emerging trends in social sciences and humanities. Along with the expert group there are METRIS country representatives, which have compiled comprehensive country reports over SSH research.
- ERA-Watch provides information on European, national and regional research policies, actors, and programmes in the EU and beyond
- ERA-nets are the European Research Area networks. Numerous ERA-nets have been established, and the two important ones in the field of SSH are:
    - NORFACE (New Opportunities for Research Funding Cooperation in Europe) a network of Social Sciences Research Councils in Europe
    - HERA (Humanities in the European Research Area) a network of European Humanities Research Councils.

3. Promotion

Promotion of the Framework Programme is an important element in the daily work of SSH NCPs, as information provision and general awareness-raising is one of the main tasks of the job. This entails producing information material as well as organising events to promote the programme. This chapter deals with the most common information material used by NCPs, from printed material to websites and other electronic means.

3.1 Information Material

Information material covering various elements of FP7, both general and specific, is produced by the EU in all the official languages and offered to the NCPs for distribution and use. In addition to that, each NCP organisation should have its own promotional material, intended for the national research community. This information material should be produced with basic information for newcomers and also more detailed brochures and materials for more experienced applicants. All information material should be accessible and available to download on the NCP's website. Remember to use the appropriate logos when designing infromation and promotion material.

Following is a list of suggested promotion material, leaflets, brochures and material which NCPs should offer, while the list is not exhaustive and of course can be tailored to your local clients needs, it covers the main types of information which clients need to participate and apply to the Framework Programme. When producing national material, keep in mind that material offered by the EU might cover some of the relevant needs and should be used whenever possible, as EU and national material can complement each other perfectly.

It is advisable to produce the majority of information in the national language for your clients, and remember to include contact details and website addresses in all leaflets and brochures so your clients know where to go to find further information.

1. **Leaflet:** NCP organisation introduction (In national language and English)
   Content: An overview of your organisation's role in FP support

   a. An introduction to your organisation

   b. Overview of the services your organisation provides:
   - Information on FP and FP themes
   - Advice in proposal submission
   - Trainings and courses on FP issues
   - Partner search

   c. Contact details and where to find further information

2. **Leaflet:** NCP overview of trainings available (In national language)
   Content: An overview of the type of FP trainings your organisation offers

   a. Details of FP training opportunities:
   - Basic FP issues

- How to write a proposal (theme specific)
- FP project management
- FP for SMEs
- Legal and financial issues in FP

b. Costs of training

c. Contact details and where to find further information

3. **Leaflet:** NCP Partner search service (In national language)
   Content: Details on the partner searching mechanisms available
   a. Partner search from EU level to national level
   b. Partner search from national level to EU level
   c. Partner search forms
   d. Contact details and where to find further information

4. **Flyer:** FP7 in brief (In national language)
   Content: Basic introduction to FP7
   a. Political background of FP7
   b. Themes and budget
   c. Funding schemes
   d. Where to find contact details for the NCPs

5. **Brochure:** FP7 in 7 steps (In national language)
   Content: Detailed information on FP7
   a. You want to innovate?
   b. What is FP7?
   c. Building blocks of FP7
   d. How does it work?
   e. For whom is FP7?
   f. How to participate?
   g. What happens next?
   h. Every chapter should contain one or two interviews with successful coordinators

6. **Factsheets:** FP7 themes (In national language)
   Content: Basic information of the FP7 themes
   a. Political background of the theme
   b. Funding schemes
   c. Potential participants
   d. Budget
   e. General subjects (in SSH = activities)
   f. Contact details of the thematic specific NCP

7. **Factsheets:** Success stories (In national language)
   Content: Detailed information of successful projects
   a. Description project
   b. Coordinator and partners
   c. Project costs and EU contribution
   d. Reference to your NCP assistance
   e. Contact details and website

8. **‚Brick book'** – National results in FP7 (In national language)
   Content: Detailed information of applications and results of calls for your country

a. Overview of number of project submissions per theme
b. Overview of national participation and coordination per theme
c. Overview participation per type
d. National success rates per call

9. **Posters** with success stories

10. **Videos / DVD's** with success stories

11. **Other promotion material** (pens, gadgets)

3.2 Newsletters

In the *NCP Guiding Principles* the European Commission recommends that NCPs organise promotional activities. Newsletters are mentioned as one possible channel of promotional activities. A newsletter is an efficient way of circulating up to date documentation on the Community RTD programmes in general and the SSH programme in particular and hence to raise awareness of and participation in the Framework Programme.

Printed or electronic newsletter?

A newsletter can both be printed and distributed by mail or it can be published electronically on the web and distributed by e-mail. The recommendations given here will mainly focus on newsletters published and distributed by electronic means (web/e-mail). The reason for this is that distribution by web/e-mail is a fast, flexible and cost efficient way of circulating information. By using electronic distribution it is also much easier for the clients to give feedback to the NCPs and obtain further information by following web-links included in the newsletter.

However, it is up to the NCPs themselves to decide what is the best option for their country depending on the availability and use of internet among persons in the target group for the newsletter. A viable solution could be a combination of a printed newsletter covering all aspects of FP7 while more specialised newsletters for the specific programmes can be published only by web and e-mail.

Target audience

A national SSH newsletter should be available to all interested parties. The main target audience could be potential national participants in the SSH programme, but also supporting and administrative personnel within research institutions.

Organisational requirements

The NCP should be a central provider of content and would normally be responsible for quality control of the newsletter. Depending on the scope of the newsletter it might be important to rely on a network of article writers or material contributors to provide information on topics with relevance to SSH researchers. Depending on the chosen technical platform, there might also be a need for a person that can handle administrative aspects like design, publishing and maintenance of a contact database.

If the NCP organisation decides to establish a newsletter, it is important that the production and distribution of the newsletter is a prioritised task within the organisation. To assure continuity and regularity a production plan and a checklist should be in place before you publish the first issue. If an electronic newsletter is chosen, there should however be room for flexibility so that publication could be adjusted to the timing of major news, events or calls. Another possibility is sending news flashes on specific upcoming news items in addition to the ordinary, regular newsletter.

Key tasks for an SSH Newsletter

A user-friendly checklist template is provided in Annex 3.

1. Operational requirements and accessibility	
Task	**Recommended actions**
The newsletter should be accessible through a normal computer and if distributed by e-mail, it should be readable for all common e-mail programmes / platforms	• Open standards and commonly available software formats preferred • If the newsletter is distributed solely by e-mail, pure text format is preferable because it can be read by all types of e-mail systems • If e-mail in html format is used, a copy of the newsletter should be available at a website. A link to the website should be included in the newsletter so that recipients who cannot read html emails can read the newsletter on the website • Your local IT-administrator should be involved in the initial planning of the newsletter so that he or she can advise you on the technical aspects of production and distribution
Copies of both printed and electronic newsletters should be available on the web	• The most obvious place to publish the SSH Newsletters is at the national SSH NCP website • An archive of former published newsletters should be available at the SSH NCP website • The newsletter could be available both in html and PDF format
The newsletter should be up-to-date and published regularly	• The minimum number of issues should be 3-4 per year; time from production of content to publishing should be as short as possible

2. Distribution lists and collection of addresses	
Task	**Recommended actions**
Use up-to date and accurate database information to select target organisations and individual recipients	• If available the distribution of the SSH newsletter should be linked to the institution's central contact database • If a new distribution list is needed, a good start would be to pick institutions and individuals that have already been in contact with the national NCPs or have an established relationship with the host organisation of the NCP. This could, for example, be participants at training courses or conferences on FP7, members of scientific boards, researchers that already participate in EU financed research projects, deans of research, directors and researchers at SSH university faculties or research institutions • If your contact database allows it, then use a personalised greeting (e.g. "Dear Dr. House…")
Respect formal regulations for mass distribution of e-mails	• Ask for consent from potential recipients to send them the newsletter. This can for instance be done by an introductory email with a reply form including the option to unsubscribe. • Explain where the contact details have been derived from in the introductory e-mail • Emphasise the non-commercial content of the newsletter, and that the information and assistance provided is free of charge

	• Use the Blind Carbon Copy (Bcc) field for mass distribution, to ensure confidentiality of your recipients' email addresses

3. Basic content	
Task	**Recommended actions**
Introduction and table of content	• Highlight the most important news you are going to present in the introduction of the newsletter • If the newsletter consists of several parts it could be a good idea to provide a list of content at the start of the newsletter. The table of content can be navigation links with direct access to the different parts of the newsletter
Contact information and NCP service	• Names and contact details (phone/e-mail) for the NCP and the organisation hosting the NCP • Links to the NCP section on your website (if available) for further information
Unique content	• Emphasise focused information relevant to the national target group • Normally the newsletter should be written in the national language • Provide insider information and analysis; do not just repeat the information supplied by CORDIS and the newsletters published by DG Research • Be reliable: double-check your sources!
Funding possibilities	• Information on forthcoming calls from the SSH programme and other FP7 programmes with relevance for SSH researchers • Call overviews for relevant ERA-NETs, JPIs etc. • Links to relevant work programmes and guidelines
News	• Short news articles on EU research/SSH research • Calendar with information on future calls and events
Events and training	• Information on national and international training courses, conferences and events in the SSH area • Links to further information and registration
Partner search	• Updates on the latest partner searches • Links to NET4SOCIETY and CORDIS partner search tools
Disclaimer	• Include a disclaimer at the end of each newsletter where you explain why the recipient receives the newsletter and offer the option to be removed from the mailing list

4. Optional content	
Task	**Recommended actions**
Photos and illustrations	• Photos and illustrations give the newsletter a more professional look and help to convey your message more effectively

News and policy documents from the EC and other EU institutions	• Links to selected news articles on policy issues with relevance for SSH • Links to policy documents with relevance for SSH
Funding outside FP7	• Updates on funding possibilities outside FP7
Presentation of cooperation partners	• Profile of the month, maybe from abroad • Focus each month on a country and present the key players • Success stories: present the people behind the project
Articles from NCP colleagues	• Show possibilities for cooperation • Interesting anecdotes and/or perspectives
Statistics and project results	• Key statistics from most recent calls • Statistics on the number of applications and financed projects for the SSH programme as such and applications/projects from the respective country • Short descriptions of results from financed projects • Great attention should be paid on the eventual confidentiality of data and documents you can find in CIRCA or from similar sources. Absolute "no-go": ESRs, Abstract and partner details of proposals not funded, Non-Papers, etc.

An SSH NCP newsletter should be accessible for everyone. It should be distributed by e-mail and published on the internet, with up-to-date and reliable information including unique content with specific information aimed at the target group!

3.3 SSH NCP Websites

A national SSH NCP website with targeted information for researchers and other stakeholders is a crucial instrument to inform and raise awareness of participation opportunities, which is one of the core duties of an NCP, as stated in the *Guiding Principles*. An SSH NCP website is a fast, flexible and cost efficient way of circulating comprehensive and specific documentation on the European Community RTD programmes in general, and the SSH programme in particular, and to raise awareness of, and participation in, the Framework Programme.

The NCP website will often be the first place your clients will obtain information about the NCP service. It is therefore important to give a clear-cut definition of your role and the services you provide. It is especially important to distinguish the non-commercial NCP service from paid private consultancies' services. It is advisable to emphasise the fact that you are working as a neutral and trusted adviser on behalf of the European Commission and the organisation you are affiliated to at the national level.

Target audience

A national SSH NCP website should be freely accessible for all interested parties. The main target audience would be potential national participants in the SSH programme, but also supporting and administrative personnel within the research institutions.

Organisational requirements

Ideally, a national SSH NCP website should be linked to a comprehensive national EU research website presenting the whole Framework Programme with interconnected sub-pages covering the specific programmes. In cases where the NCPs responsibilities for the different specific programmes are attached to separate organisations, a fully integrated national NCP website might be difficult to achieve. In that case a proper coordination of the different NCP websites, including reciprocal links between the websites is desirable. Coordination is of particular importance for the SSH area since calls with relevance for SSH researchers can be found in nearly all specific programmes within the Framework Programme.

The NCP website needs to have a dedicated member of staff responsible for quality control and regular updating.

Basic versus advanced SSH NCP website

In the checklist below, the recommendations for an SSH NCP website have been divided into three categories: operational requirements, content of a basic website and content of an advanced website. The recommendations for a basic website should be obtainable even for NCP organisations with limited administrative and/or technical capacity, while the recommendations for an advanced website could be considered as optional features for making the website more comprehensive and interactive.

Key components of an NCP website

A more user-friendly checklist template is provided in Annex 3.

1. Operational requirements	
Task	**Recommended actions**
The website should be accessible through a basic computer	• Open standards and commonly available software formats should be preferred • Your local IT-administrator should be involved in the initial planning of a website so that he or she can advise you on technical aspects
The website should be easy to update and be adaptable to technological advances	• Chose technical solutions that are easy to both administer and use, and are adaptable to technological advances • Consult your local IT-administrator in order to assure that the technical solutions are compatible with the standards used in your host organisation
The website should be easy to find	• The national SSH NCP website should be linked to other national EU research web pages and preferably also to web pages containing information on national SSH research • The website should be promoted through other channels of communication to the target group like emails, newsletters and brochures • The URL address of the website should be easy to remember. If a national EU research website covering the whole Framework Programme is established, then e.g. www.fp7.xy
The website should be easy to understand and navigate	• The website should contain simple and clear information in the national language • In order to explain your services to non-native speakers and researchers from abroad there should also be some

	information in English • Excessive use of acronyms should be avoided and all acronyms must be explained • The website should be structured by clearly identified sections, intuitive menus and navigating tools

Content of a basic website

The content proposed here is what could be considered as key information for the target group. The organisation of the recommended information depends on the structure of the national EU research website(s). If a national EU research website covering the whole Framework Programme is established, more general information related to all FP7 programmes, like proposal preparation, news, training, legal and financial issues and what kind of services the NCPs provide, could preferably be presented there. The SSH NCP website could then simply link to the general FP7 website for these issues.

2. Basic Content	
Task	**Recommended actions**
General information	• Short introduction to EU research, FP7 and the SSH programme • General description of the NCP service
Funding possibilities	• Call overviews for the SSH programme and other FP7 programmes with relevance for SSH researchers • Call overviews for relevant ERA-NETs • Links to the latest SSH Work programme and related documents for proposal preparation • Links to other FP7 programmes with relevance for SSH researchers
News	• News articles on EU research/SSH research • Calendar with information on calls and events • National SSH NCP newsletter
Events and training	• Information on available training courses • Information on national and international conferences and events in the SSH area
How to get support?	• List of national NCPs and FP7 advisors in the research institutions • Services Offered by the NCPs and other advisor; • Financial support • Research Enquiry Service
Legal and financial issues	• General advice on legal and financial issues • Links to other sources of information • IPR Help Desk
Links **(see annex with relevant links for the specific URLs)**	• CORDIS • Cordis newsletters • DG research • EC Publications office • ERA-NETs (relevant for SSH • National websites related to SSH research

	• NET4SOCIETY website
Further sources of information	• Subscription to news updates and newsletters • Catalogue of already published Newsletters on FP7 and SSH
Contact information	• Names and contact details (phone/e-mail) for the NCP and the organisation hosting the NCP

3. Additional content of a more advanced website	
Task	**Recommended actions**
General information	• Downloadable information packs
Funding possibilities	• Description and links to European research funding possibilities outside FP 7 like COST networks, European Science Foundation, EU action programmes like Progress and Lifelong Learning, CIP, JTIs, JPIs, JRC and ETP • Links and updates of public tenders relevant to SSH researchers • Description of funding schemes relevant to SSH (aim, activities, budget, size, duration)
News	• Online subscription to news updates from the NCP website
Events and training	• Online registration to training courses • Summaries, documentation and photos from events
How to get support?	• Online guide on how to write a proposal, legal and financial affairs, IPR etc. • Online help desk – inquiry form
Legal and financial issues	Information material and/or links: • Guide to financial and legal issues • How to prepare your budget • Legal issues • IPR • DESKA model consortium agreement
Statistics and results	• Call results from the SSH programme • Statistics on the number of applications and financed projects for the SSH programme as such and applications/projects from the respective country • Abstracts of funded proposals • Great attention should be paid on the eventual confidentiality of data and documents you find in CIRCA or from similar sources. Absolute “no-go”: ESRs, Abstract and partner details of unsuccessful proposals, Non-Papers, etc.
Case studies	• Case studies • Success stories • Testimonials of successful researchers
European and international research	Short description of and links to institutions like: • ERA-NETs (relevant for SSH)

institutions/structures	• ERAWATCH; ERC; ESF; COST; COST Networks; CIP; ETPs; JTIs; JRC.
Policy documents	• Policy documents on European research cooperation from national and European institutions. Links and/or documents for downloading • Presentations and speeches by official representatives from national ministries, research institutions, research administrative agencies and the EU institutions etc.
Partner search (see also chapter on partner search)	• Online tool for submitting partner searches to be distributed through the NCP network • Links to NET4SOCIETY partner search tool and research directory • Links to CORDIS partner search and other relevant partner search tools
FAQ and search tool	• Page with FAQs • Search tool for searching the content of the national EU research website and/or SSH NCP website
Further sources of information	• On-line registration to client database • Subscription to news updates • Info session DVDs or webcasts • Order form for printed information material
Contact information	• Profiles and photos of the NCPs
Interactive services	• Open or moderated discussion forums • Interactive guides, templates and tests • Links to profiles on social networks.

A national SSH NCP website should be:

- **Freely accessible for those interested**
- **Linked to a comprehensive national EU research website**
- **Frequently updated**
- **Easy to find, understand and navigate**
- **Provide information on FP7, SSH, funding opportunities and how to get support**

Promotion through NET4SOCIETY

The NCP network NET4SOCIETY has a website with lots of useful information for researchers. Information on SSH events and brokerage events is available to the general public. The partner search tool facilitates disseminating profiles among potential proposers and the NET4SOCIETY research directory lists the key SSH actors in Europe and the world. The website library includes new Commission publications with SSH relevance.

All SSH NCPs' contact details are available on the website to facilitate first contact between researchers and NCPs, especially for researchers in third countries.

SSH NCPs are invited to promote their national events via the SSH event calendar. Important press releases may be uploaded in the public section.

3.4 Using Social Media

Social media is an umbrella term that defines the various activities that integrate technology, social interaction, and the construction of words, pictures, video and audio over the internet. The social media revolution began in the late 1970s with Usernets and Bulletin Board Systems, evolving throughout the 80s and 90s in to the web-dominating catalogue of social and professional networking, media sharing and social news sites and facilities we see today. By 2010 internet statistics show that three of the world's most popular online brands are social media related, i.e. Facebook, YouTube and Wikipedia. Taking Facebook as an example, its 500 million active users of Facebook spend over 700 billion minutes on the site each month and 50% log on every day. This presents a huge potential audience who is already engaged in the site and using it on a regular basis. Facebook and Twitter dominate the social media and are probably the quickest and simplest ways of conveying information to large audiences. Another quite common social media site, LinkedIn, has developed into being an important means of networking for academics and professionals and is an interesting way of directing certain groups into a more focused social networking group.

As a National Contact Point, using social media, in particular social networking is a quick, cheap and easy way to disseminate information about SSH to the masses. On Facebook, it is possible to create a group and invite people to join, and then update the group with links between pages on the web. On Twitter, you can create a specific user and then „tweet' updates. Both methods require a little work in terms of setting them up and inviting people to join. LinkedIn currently functions more like a network only and has limited use as a site for promotion and information dissemination.

Once you have set up your page or account, e.g. on Facebook, it's simple: just update whenever you have information which you think might be of interest to your community.

This could include:

- Work Programme news and information
- Call information
- Events
- News (country-specific or general)
- Partner searches
- Project outcomes
- Impact

The use of social media is still rather new in the work of NCPs and it remains to be seen if it will become more prominent as a promotion tool. However, it is an exciting alternative to more traditional promotional methods and NCPs will certainly keep an eye on developments in the area.

4. Event Management

National Contact Points (NCPs) are dedicated to raising awareness and promoting FP7 using different types of tools (as described in chapter 3). In chapter four, Event Management, the second step of FP7 promotion, is detailed and the chapter focuses on the organisation of three types of events; information days, matchmaking/brokerage events and special seminars.

Best practices are important when hosting events, as an effective, well managed event can inspire researchers to participate in FP7. Events are also a useful tool to communicate with a large group of your clients. Events will often be the first time you come into contract with future applicants, so it is vital to make a good impression.

A core NCP task (from the *NCP Guiding Principles*) is to organise training sessions on RTD programmes for applicants and research advisors. NCPs should also organise training seminars for specific target groups (SMEs, universities, professional organisations, women in science, etc.) or on specific topics (legal aspects, rules of participation, research areas covered by several specific programmes, ethical aspects etc.). An important factor in planning events is to organise promotional activities in liaison with the Commission services (e.g. info days, fairs, matchmaking events).

This chapter includes two checklists, one for the organisation of an info day and the other for the organisation of a specific seminar. They both can be found in the handbook Annex 3, so that you can easily use them in your event planning, print them out individually or use them in any way you want.

4.1 Organisation and Promotion of Information Days for FP7

The Commission advises NCPs to organise information days about FP7 as awareness raising activities. An Info day is an instrument to raise awareness about research funding opportunities in FP7.

Information days are usually free of charge for attendees and are aimed at providing call-specific information to a broader audience of researchers, private enterprises, civil society organisations and other stakeholders. These events are commonly arranged at the beginning of the Framework Programme or when new calls are announced, maybe even as joint events with other themes in FP7.

It is recommended to organise a thematic info day with a complementary agenda (e.g. Health; ICT) which could enable interested stakeholders to get as much detailed information and support in the relevant thematic area as possible. This will also provide a forum for stakeholders with a complementary background to meet and it will foster networking and matchmaking opportunities.

For the organisation of an info-day you need to define the target audience, set up an excellent agenda and devise a clear operational plan.

Target audience, agenda and operational plan

There are three basic elements that should be addressed when organising information days, defining the target audience, setting up the agenda or programme, and develop an operational plan.

1. Defining the target audience

The audience will most likely be composed of both experienced Framework Programme participants as well as newcomers, who all expect information that is new and relevant to them.

2. Setting up the programme

An info day typically involves providing information on opportunities for SSH researchers in FP7 and if possible on national funding as well. The SSH NCP information day will focus on the SSH theme, or a call for proposals in a thematic area with relevance to SSH researchers. It is also useful to invite successful coordinators or partners, programme delegates and evaluators to speak at the info day.

a) Case study examples and success or best practice stories from successful coordinators or participants are useful and interesting for newcomers.
b) Inviting expert evaluators to give a “field report” and answer questions about the evaluation process constitutes a good element for attracting an audience.
c) Programme Committee members and your National Delegate (in some countries the Delegate and NCP are the same person) are important sources of information and can give an inside view of how your country is contributing towards SSH within the Programme Committee. They can also, to a certain extent, give insights about the process of the programme development, even though PC members as well as evaluators are bound by confidentiality and cannot disclose any specific information that would put event participants in a privileged position compared to other potential applicants, nor can they provide any information that is classified in the application, evaluation or selection process.

Networking sessions throughout the info day provide researchers with the opportunity to discuss their project ideas. One-to-one meetings with the NCP or, if feasible, directly with the EC official presenting the call, can provide researchers with personal advice on the next steps to take.

As an additional feature, you could include presentations of project ideas from SSH researchers. For this to be successful it is advisable to gather project ideas well in advance of the info-day, setting a deadline for submission of project ideas. If you are organising bilateral meetings for researchers with the EC officials, or with NCPs you should set a deadline for submission of the profiles of a limited number of participants and then set an agenda with time allocations for each bilateral meeting. More information about organising bilateral meetings can be found in the matchmaking events section.

Which language should be used? Be aware, there is a risk of using too much FP7-jargon in presentations. A good idea would be to introduce FP7 terminology in English, but translate the meaning into your own language. A few interactive elements will make the programme more stimulating.

What should be distributed? In terms of material to be distributed it is always useful to order SSH publications in advance (at least 1 month before the info day, as time could be needed for printing new material) through the Commission services. The publications and the shipment are free of charge. NCPs can select specific policy reviews, policy briefs, project synopses and other promotional materials from the publications list. Publications should be ordered according to the thematic areas of interest of the audience. The publications can be then freely distributed to the participants during the info day.

3. Developing an operational plan

It is necessary to develop a detailed operatonal plan to identify speakers, produce and distribute relevant material and cover logistical needs. Most likely, the size of the audience will vary, possibly from 30 to 150 participants, depending on the marketing efforts and the timing as well as the interest and size of your target audience. The info day organisation checklist covers all aspects of e vent planning. Two additional suggestions to make the event as successful as possible are.

a. **Find an event organiser:** Information days can be co-organised with other organisations who promote research to share the resource burdens. A good way of reaching an SSH audience is to organise the information day in collaboration with universities and research organisations or with the government research ministry. This allows the NCP to share the cost and effort of organising the meeting, as well as maximising the visibility and promotion of the event. Co-operation partners are usually willing to help with providing the location and promoting the event. Ask them to give input on the programme agenda, as they will help to make it more target-oriented. Identify and contact your partners early in the planning stages (at least 3 months before).

b. **Carefully consider the timing of the event:** Ideally, the information day should take place as shortly after the publication of the call as possible. This will generate interest in submitting proposals whilst leaving sufficient time for finding partners and proposal writing. To attract a large audience, it is advisable to have free of charge events. The ideal info day duration is up to one full day; longer events cause a high risk of losing the impact and interest of the audience.

Annex 3 provides useful checklist for event management and organisation. The checklists are a best practice model developed by the best practice guide “In Search of Excellence” for Supporting SMEs in the European Research Area and have been revised by the NET4SOCIETY NCPs.

Please refer to Annex 3 for complete and user-friendly checklists for organising promotional events and FP7 Info days.

4.2 Organisation and Promotion of Brokerage Events

A brokerage event (sometimes called matchmaking event) can be defined as a networking event organised to bring together researchers, institutions, companies and CSOs in order to support new collaboration opportunities and networking in specific research fields. This type of event is generally organised at international or transnational level. In these events, participants can generally have several bilateral meetings of around 30 minutes’ duration to discuss project ideas and potentially initiate new collaborations within FP7 cooperation actions.

The main objectives of an FP7 brokerage event are:

- To bring together researchers who have project ideas (coordinators looking for partners or partners offering their expertise to join a consortium) on newly published calls
- To get first hand information from FP7 experts on relevant FP7 calls
- To meet other European or third countries’ colleagues and key players in order to initiate new consortia
- To share experience on upcoming projects

The tools of a brokerage event:

1. Concept Paper

The Concept Paper is designed to determine the steps that should be taken before, at and after the event. The concept paper mainly addresses the major points of the event check list. *Before* the event, the check list should be prepared to follow the steps before and during the event.

2. Event Agenda

The content of the agenda directly depends on the scale of the event. Normally, a brokerage event is only half a day, but still, it may include many parts and this is the main reason why the agenda of the event is so important. Often, a brokerage event is combined with Info days, conferences and workshops. A one-day brokerage event may consist of a plenary, parallel sessions and brokerage sessions, or bilateral sessions, aimed at matchmaking.

It is a good idea to start with a plenary session where either official(s) from the European Commission and/or the relevant NCP welcome the participants with an informative session on the relevant call, Work Programme or on the Framework Programme in general. Before setting up the agenda, it is important to contact potential speakers in time, especially if you intend to invite speakers from the European Commission. Parallel sessions can be organised around specific topics, each of which could sessions be related to the topics of current Work Programme under the relevant call. For identifying the topics of the parallel sessions, you should examine in detail the current Work Programme and categorise the topics into groups. After deciding on the subjects of parallel sessions, it is necessary to consider relevant speakers to invite, such as EC officials or coordinators of successful projects who will be able to share their knowledge and experiences on related research fields. You might consider using teleconferencing if any of the suggested speakers cannot attend the event. In this case, make sure that all technological requirements can be met on both ends.

In the brokerage, or matchmaking session part, participants carry out several bilateral meetings in order to share potential project ideas within the current FP7 call. The basic aims of these bilateral meetings are to design potential projects on current call and to promote potential cooperation.

Brokerage events may be combined with large conferences or info days, even in collaboration with relevant ministries, universities or SMEs. Remember to allocate tasks among everyone participating in the organisation.

3. Web tool

The aim of the brokerage event is to offer participants, and possible FP7 clients, the possibility to attend organised meetings with potential cooperation partners within a single day. Before, the organiser, or the NCP, had to invest months of work into organising these events, but with the internet, this has changed.

An efficient web tool is essential for enabling the participants to register, upload their profiles, check the other participants' profiles on the web, select the researchers they want to meet andrfinally schedule theit bilateral meetings agenda. Through the web tool it will possible also to upload the agenda of the event, to include logistic information about the venue and contact details of the organisers.

There are several available tools for this kind of work, some examples are B2fair, ConVerve, BEMT of the EEN, B2match, etc. For instance, B2fair is the matchmaking scheme used for international trade fairs and conferences and offers SMEs a platform for the opportunity to meet new business partners, customers and suppliers in a very simple, cost-saving and efficient way; whereas ConVerve has been in operation since 2000 providing support for trade fairs, conferences, networks and specialist groups all over the world in order to establish business partnerships more quickly and efficiently.

The success of the event relies also heavily on the correct management of this tool. It can be adapted to the event features and personalised accordingly. It is essential to periodically get in touch with the web tool manager in order to define step by step the procedures to be undertaken. The web tools usually include easy-to-read guidelines that will guide you step by step in the event organisation.

It is important to check periodically the accuracy and completeness of the profiles uploaded by the researchers and to get in touch with them if relevant information is missing. One or two people fully dedicated to this activity, especially the last weeks before the event, are essential in order to get in touch with all registered participants and ensure their presence at the event.

Important points about the event web tool:

- Participants can register through the web tool
- Profiles of registered users are validated by administrators (organisers of the event)
- Search all profiles of participants via web tool
- Select online bilateral meetings 15 days before the event
- Participants receive their meetings schedule automatically few days before the event
- Participants can edit/updated their profiles any time via their login or password
- In all steps taken during registration and validation process participants are informed by e-mail

4. Checklists

There are some key issues to keep in mind, when organising a brokerage event, before, during and after the event itself.

A complete checklist for the organisation of brokerage events can be found in Annex 3, but below is a summary of key points to remember when organising a brokerage event:

Key points for organising a brokerage event:

- **Use check lists to make sure you remember all details of the organisation (checklist templates provided in Annex 3)**
- **Decide on date and venue at least 6 months before the event**
- **Be prepared to last minute changes – a back-up plan is essential!**
- **Allocate tasks among co-organizers and set clear deadlines!**
- **Set the agenda**
- **Launch event website as soon as possible**
- **Check periodically the profiles uploaded on the web tool and get in touch with registered participants**
- **Carefully select the speakers based on their background and expertise fitting the scope of the event**
- **Brief speakers and panellists about their expected contribution to the debate**
- **Discuss with the moderators the objectives and expected outcomes of their panels**
- **Promote your event via all possible channels (websites, mailings, leaflet, newsletters, telephone etc.)**

4.3 Special Seminars and Trainings for Specific Target Groups

The Commission advises NCPs to organise training seminars for specific target groups. Professional training seminars are used to raise awareness of EU-funded research opportunities, to assist project proposal writers, and to increase the ability of coordinators and other participants in developing, submitting and managing EU projects.

This chapter provides the tools required for the organisation of a special training and it also gives information on how to improve seminars.

Basically, there are two elements that have to be addressed when organising training seminar or workshops:

1. Definition of a clear strategy for the training programme and development of an appropriate methodology for the training delivery
2. Development of a detailed operational plan to define locations, identify and assign trainers, produce and distribute training and reference materials and procure logistical needs.

1. Definition of a clear strategy and methodology

Target audience

The audience of special trainings for SSH researchers/SSH proposers will come from different organisations (universities, private companies, or consultancies), with different functions (FP7 advisor, researcher, and administrator), from different research areas (SSH, Health, energy…) and with a different level of experience.
Therefore it is necessary to define specific trainings in order to fulfil the diverse training expectations. National training workshops could be divided into the following target oriented topics (based on the experience of the participants)

a. Newcomers (the target audience has no experience with FP7);
b. Proposal Preparation (the target audience has an idea of FP7 and wants to write a proposal);
c. Project Management (the target group is a partner or coordinator of an FP7 project).

Other national trainings could be focused on the different organisations, special research related trainings for universities, e.g. SSH in FP7 for the department of social sciences and humanities.
Other target groups are financial administrators, project administrators and financial project coordinators, who require a tailor made seminar about financial issues.

The target audience should be addressed clearly, inviting the "right" people to the "right" seminar. It is recommended that you use an event registration process, asking the participants about their training expectations. Further more, if the experience levels of the participants are very different, the training can be created in a way that the seminar participants learn from each other.

Interactive sessions

Basic: It is important to use visual aids such as power point when delivering a presentation and you should also provide a forum for questions, either at the end of the presentation or during it. A varied group of speakers and topics makes a seminar more interesting and lively. If possible, try to integrate at least one or two short interactive sessions, e.g. asking the participants to talk about specific topics with his/her neighbour for 5–10 minutes; or asking the audience to prepare questions/remarks/their expectations on small cards, which are then discussed by the entire group.

Advanced: In an advanced training the focus should be on interactivity during the training sessions. Each time block (morning, afternoon) should be divided into a theoretical and a practical part. Case studies (with real-life examples), interactive exercises that match the audience, positive surprises as well as well-structured course material will ensure that the participants will gain from the training workshops. The trainer should include demonstrations and/or hands-on practice, examples and ideas. To give you an example here are interactive session descriptions for three different targeted seminars.

a. **Newcomers**
To make newcomers aware of their future possibilities in FP7 it is useful to know where they come from and how much they know about the Framework Programme. A **formation exercise** is a useful tool to gain this information. There are many types of formation exercises for example the four corners exercise. In this exercise the trainer prepares 4 signs with four of the expected group types (SME, Research Institute, Industry and University) and sticks these to the four corners of the seminar room. The participants are then asked to stand up and go into "their" corner. The trainer can then ask the group questions to get an insight into the background of each participant, ad get a feeling for the balance of the group. Other formations can be done with new questions such as levels of experience with FP7 (newcomer, previous applicant, project partner, project coordinator). This formation exercise can be used in different ways and with different classes and it useful for both the trainer and the participants to quickly identify each others knowledge and experience.

b. Proposal preparation
Financial issues are often the most difficult and question intense topics during the preparation of a proposal. Therefore a **budget exercise** can be a useful tool at proposal preparation seminar. In such an exercise you can give the participants a prepared excel sheet with two/three different types of partners, asking participants to calculate the budget research funding in a FP7 project, dependent on the partner type, and the partner tasks. Participants should work by themselves, and then the solutions should be presented by the trainer either as a group or individually.

c. Project management
Consortium agreements are a crucial step in project management. In a project management seminar an interactive session to advise on preparing a **"consortium agreement"** is recommended. One method is to give the seminar participants six different abstracts from real-life consortium agreements. In small working groups the participants have to find out what is the main topic / issue being addressed in the abstract and how would such an issue affect the consortium? The session could close with a presentation and discussion of the working group conclusions by the whole group.

In interactive sessions, substantial advance preparation time is essential; calculate enough time for all the planed activities. Training groups should not exceed 25 people, in order to fully address the participants' needs. Sometimes, even smaller groups are more effective.

Skilled trainers
An important issue for organising training is ensuring that there are sufficiently skilled trainers available to conduct the training. The success of the sessions may depend significantly on the trainer's abilities to communicate and manage larger groups.

In national training seminars it is recommend having skilled trainers delivering these session in the local language, in order to meet the clients interest and their ability to understand.

2. Determination of the operational plan

Once the target audience and workshop design are defined, the operational part of the seminar has to be organised.

Venue: Make sure you book a venue with sufficient space to accommodate your audience, and also appropriate space for your interactive exercises. Think about the way the chairs should be arranged, and if you are providing catering, where it should be positioned.

Find a seminar room with daylight, preferably with a natural scenic view

Date: Find a date which suits the audience and the trainers and yourself, keep public holidays and summer holidays in mind.

Catering: A good seminar needs to provide adequate catering and refreshments. Participants will be more attentive if they are not preoccupied by thirst or hunger!

Technical Equipment: Ask the trainers, if they need additional equipment and check the technical equipment prior to the seminar

Title: Find a catchy and clear descriptive title in order to attract the right audience.

Promotion: In addition to your website, newsletters or mailings to potentially interested organisations, direct marketing to members of your client data base might also be successful. Personal phone calls might help to improve the agenda, by providing an opportunity for you to find out the specific needs of the registered participants. Further more the personal contact will help you to establish contact to your clients, the future FP7 coordinators and partners.

**Coffee and tea in the morning and a person at the entrance of the meeting room greeting everyone with a handshake makes the seminar special.
participants feel a warm welcome and appreciate the inviting atmosphere**

Please refer to Annex 3 for complete and user-friendly checklists for organising seminars and trainings for specific target groups.

5. Partner Search

An essential requirement for the participation in a collaborative research project is the appropriate research partners. It is a challenge for new comers to FP7 to find partners, and to raise their international profile. Many research institutes and organisations already have established international networks and their researchers can rely on the established reputations of such institutions. For newer, less established research institutions and researchers at earlier stages in their career, it can be difficult to find the right partners for the participation in Framework Programme 7 (FP7) or other international collaborative research programmes. Therefore it is vital to provide these researchers with information on the established partner search services, which are available. This chapter gives an inside view on some existing research networks and on different partner search facilities.

Basic

1. How to use the different partner search services

Most of the partner search facilities listed here, allow researchers to fill in an online form, via a website which then publishes partner search requests directly on their web pages. Generally it is recommended to distinguish between two different kinds of partner search:

- Researchers with a concrete project idea, who would like to coordinate a project
- Researchers who are offering their expertise and would like to be collaborative partners in a research project

Some researchers use a web based partner search service without contacting the NCP; others will contact the NCP to ask for advice. In both cases it is recommended that the NCP get in contact with the researcher to ensure all partner search questions are addressed and to verify the conformity of their research area with the selected open topic. This will also give the NCP an opportunity to verify the quality of the partner search, which is an important criterion for a successful partner search. Furthermore as NCP you also create an opportunity to add the researchers contact details and their research interests in your client database, and to get additional information on your national research community.

A partner search form should contain as a minimum the following information:

Information on Project
- Topic, Area
- Project idea

Target Partner Sought
- Organisation type
- Role of partner

Contact Details
- Address
- Organisation Profile

Agreement for publication
Date the search is valid until.

There are two partner search templates available.

Advanced

2. Different Partner Search Facilities

Different research programmes use many different online partner search service tools. CORDIS are currently reorganising their partner search service, once this is complete (expected spring 2011) it should be easier for the NCPs and our clients to use the CORDIS tool as the main online partner search service. In the interim here a few examples of some useful partner search facilities.

CORDIS

CORDIS is the official entry point to Europe's Seventh Framework Programme for research and technology development (FP7). The service supports researchers in finding research partners for their projects, either in the context of EU-funded Research and Development projects or within a broader search for technology-orientated partnerships.

On their web page CORDIS offers a search facility to find international partners. Researchers can publish their profile by entering their project idea or specific expertise; researchers can also search through all the partner profiles submitted by other organisations.

NET4SOCIETY Project website

NET4SOCIETY is the National Contact Points (NCPs) project in the Socio-economic sciences and humanities (SSH) field. NCPs are set up to guide researchers in their quest for securing EU funding, and partner search is part of their work. NET4SOCIETY actively supports networking in the SSH research community and offers improved partner search facilities and matchmaking events for connecting potential project partners. Researchers can upload a partner search form from the project web page and send the completed form to their local NCP. The NCP will check the form and upload it on the project web page.

IDEAL-ist

Ideal-ist is an international ICT partner search network. Ideal-ist addresses ICT companies and research organisations worldwide, looking to find project partners in the Seventh Framework Programme (FP7) of the European Commission. The Idealist online partner search is based on a number of key elements:

- It operates with specific vetted proposal ideas, rather than generally advertising research capability.
- It is tightly supervised in that each proposed search is reviewed prior to being published by the National expert and the Quality team and checked for applicability and basic accuracy.
- It is proactive in seeking out potential partners, rather than simply storing them in a database, waiting to be discovered by an online user.
- It targets the Strategic Objectives of the ICT Theme and is call-specific.

Fit for Heath

The success of the SMEs go Health project in its support of SMEs and researchers prompted a new follow-up initiative entitled Fit for Health which started in October 2010. The members of this new consortium support SMEs and academic. Experienced FP7 NCPs for "Health" and "SMEs" will help innovative SMEs, researchers from universities and research centres during all phases of FP7 projects, from the project idea to the efficient and effective realisation of project results. The Fit for Health database offers both profiles of SMEs and research institutes interested in becoming involved in FP7 research projects as well as partner searches of research consortia looking for SME partners.

The Enterprise Europe Network (EEN)

The Enterprise Europe Network is a key instrument in the EU's strategy to boost growth and jobs. Bringing together 570 business support organisations from 45 countries, the EEN helps small companies seize business opportunities in the EU Single Market. The goal of the Enterprise Europe Network is to connect organisations that are offering or seeking market ready research results, technological innovations or technical problem solutions. EEN offers support in finding innovative technologies and co-operation partners in the different sectors by searching the technology profiles database which contains thousands of offers and requests from companies and R&D institutions from Europe.

3. Existing Research Networks

Established research networks offer more possibilities to identify research partners within specific research areas. Listed here are a selection of Socio-economic Sciences and the Humanities international research networks.

a) Research Networks

The European Sociological Association (ESA)

The European Sociological Association (ESA) aims to facilitate sociological research, teaching and communication on European issues, and to give sociology a voice in European affairs. Research Networks perform essential roles within the ESA. They constitute the main forum for sociological advancement and debate within the various specialist areas within European sociology. The ESA Executive Committee organises regular meetings among their members and other interested sociologists and have a key role in preparing the program of the large bi-annual ESA conference. The ESA provides information on this network, on conferences, publications and more.

European Science Foundation (ESF)

The European Science Foundation (ESF) is an association of 79 member organisations devoted to scientific research in 30 European countries. Established in 1974, a wide range of pan-European scientific initiatives have been coordinated, and the flexible organisation structure means ESF can respond quickly to new developments. ESF's core purpose is to promote high quality science at a European level, and setting science agendas for Europe. The ESF provides a common platform for its Member Organisations to advance European research and to explore new directions for research at the European level. Through its activities, the ESF serves the needs of the European research community in a global context, and represents all scientific fields, with specific standing committees for the Social Sciences and the Humanities who oversee specific research programmes with regular calls.

COST

COST is an intergovernmental framework for European cooperation in science and technology, allowing the coordination of nationally-funded research on a European level. COST contributes to reducing the fragmentation in European research investments and opening the European Research Area to cooperation worldwide. COST is based on networks, called COST Actions, centred on research projects in fields that are of interest to at least five COST countries. The domain “Individuals, Societies, Cultures and Health” (ISCH) supports the development of knowledge and insights for citizens, democratic debate and decision-making in the public, private and voluntary spheres.

METRIS

METRIS - Monitoring European trends in Social Sciences and Humanities - is a service launched by the European Commission, DG-Research, Directorate L, "Science, Economy and Society" in order to provide an overview of these fields in Europe. The service is addressed to all decision-makers concerned with social sciences and humanities, and all those interested in the European Research Area. On the METRIS website you can find information on policy setting systems, funding systems and performing systems of each METRIS participant country. (Also see the official sources of information chapter).

b) Conferences

International conferences are also a good opportunity for researchers to look for appropriate research partnerships. In addition to the agenda presentations, discussions and possibilities for networking, conferences are increasingly linked to pre-arranged bilateral meetings. These matchmaking or brokerage events are a useful opportunity to establish international contacts.

References to international events and conferences can also be found on the web pages of the listed networks.

Information on upcoming and past Socio-economic Sciences and the Humanities (SSH) related events can be found on the thematic web page of the European Commission.

Most NCP organisations publish information on upcoming international conferences and events on their web pages. For more information please see the web page of the NET4SOCIETY project website where all organisations are listed.

6. Consultation and Support

According to the NCP mission as outlined in the *NCP Guidelines*, the provision of a personal consultation service for researchers is seen as a very important task.

Complete and user-friendly checklist templates for all the elements of client consultation and support are provided in Annex 3!

6.1 Personal Consulting including Check and Review of Project Ideas

A high level of assistance services is essential for successful proposals. Even if researchers are more or less experienced in the submission of proposals when they contact their NCP, they always expect personal advice, given by competent people.

The level of information and advice required depends on:

- The experience of researchers as project coordinators or participants in Framework Programmes
- The way the personal consulting is provided (face-to-face meetings, phone calls or e-mails)

Phone calls and e-mails are mostly used for questions which do not require a specific analysis of the issues (e.g. when is the deadline for the forthcoming call?). Face-to-face meetings are more appropriate when the requests need deeper answers (e.g. does my project match with the topics of the open call?).

Nevertheless, the general features related to the tasks fulfilled by NCPs are the following ones:
- Preparation and conduct of the meetings;
- Technical aspects addressed regarding the proposal.

Key tasks for preparing and conducting a personal consultation

A more user-friendly checklist template is provided in Annex 3.

1. Preparation and conduct of the consultancy meeting	
Tasks	**Recommendations**
Ask for a short description of the project idea (up to 3 pages)	Time frame: Before the meeting
If in doubt of the suitability of the project for a topic, check with a project officer of EC	Time frame: Before the meeting
Establish – as far as possible - some agenda points before the meeting	• Suitability of topic chosen; • specificity of the research axes to be addressed; • eligibility criteria and other requirements for the topic chosen (e.g. ICPC or SME participation); • alternative topics based on the client's project idea. Time frame: Before the meeting
Collect and read all relevant documents related to the researcher's subject	• Information on EC policies • EC communications • Relevant articles Time frame: Before the meeting
Summarise the objectives of the meeting	• Take into account both researcher and NCP expectations. Time frame: At the beginning of the meeting
Explain to the researcher the assistance she/he can expect from the NCP	• What NCP can do and what she/he cannot do. Time frame: At the beginning of the meeting
Create conditions for a good dialogue	• Establish time frame for meeting • Be sure that you have a good understanding of the project if necessary ask the researcher to reformulate some points • Speak to the researcher on equal level; • Be firm without being rude • Use understandable and simple words and concepts (avoid "EC jargon"…); • Keep a non-judgemental attitude to the researcher's proposal and objectives (explain that you provide assessment of the proposal fit and the EC expectations). Time frame: During the meeting
Respect the confidentiality of the information provided	Time frame: Before and after the meeting
Record in a table or database the advice given.	Time frame: After the meeting
Feedback on the proposal process.	• Send to researcher any new information relevant to project • Keep in contact • Ask for the final proposal. Time frame: After the meeting

2. Technical aspects addressed regarding the proposal	
Tasks	**Recommendations**
Check the suitability of the project for the chosen topic	• Explain the logic of the EU research within FP7 • Read the topic "word-by-word" with the researcher • Check that the funding scheme chosen by the researcher is possible according to the topic • Do not encourage researchers who have no chance of succeeding • If relevant, try to identify with the researcher other themes or programmes the project could be connected to Time frame: During the meeting
Give advice on the proposal writing and submission (depends on the experience of the researcher in FP Programmes)	• Explain the eligibility criteria (do not forget the eligibility criteria mentioned in the Work Programme) • Read the guide for applicants (Part A – Part B/template for writing the proposal) with the researcher • Explain the use of EPSS • Explain the funding schemes and the rules for participation • Emphasise the evaluation criteria, the success rates and the challenges of proposal writing Time frame: During the meeting
Keep in mind some "key questions" to be addressed by the researcher	• Why bother (what problem is she/he trying to solve)? • Is it European priority (could it be solved at national level)? • Is the solution already available (check the results of FP5 & FP6 projects on the same theme)? • Why now? • Why him/her (does she/he have the best consortium to do this work)? Time frame: During the meeting
Explain the importance of a dissemination strategy for the European Commission	• Draw the researcher's attention to the necessity of thinking and describing a good and precise dissemination strategy • What tools and dissemination methods will be used, e.g. reports, conferences, training courses, publications, databases etc. • Who are the potential end users of the results: policy makers, stakeholders, researchers, SMEs, civil society etc. • How will the results be communicated to the end users? • Will it be necessary to define a specific intellectual property policy (particularly important with the development of software or databases) Time frame: During the meeting
Emphasise the importance of writing the "Impact" section of the proposal	• Define "Impact" both at political and research levels • How will the research impact contribute to the long term political impact? • Does the proposal demonstrate its relevance to the context of major EC / EU policy documents, such as the EU2020 strategy or the Innovation Union flagship initiative? Time frame: During the meeting
Explain the gender aspects	• How will the consortium promote gender equality in the project or in the field of research?

	• What actions will be taken to improve the gender balance in the project consortium / facilitating the participation of women in project events such as workshops, summer schools? • Consider the introduction of specific gender dimension actions for the project Time frame: During the meeting
Identify ethical issues	• Does the proposal contain ethical issues (e.g. informed consent, data protection etc.)? • If yes, find arguments to convince the ethical review panel that the project won't contravene any fundamental rights or national and international legislations • Time frame: During the meeting

Check and review of project ideas

An important NCP activity is checking and reviewing project ideas, and how to work with key words in defining the topic. This includes checking eligibility, relevance, impact and consortium composition. This can be done through different levels.

In the Annex 3 you will find useful checklist templates to assist this process:

NCPs should use their connections in a targeted way and could for instance use the N4S website to identify who has knowledge of proposals in certain areas. If in doubt, NCPs could contact the Commission for further details on suitability.

6.2 Support on Proposal Preparation

Proposal preparation is the process between checking the project idea and the final proposal submission. Submitting a quality proposal calls for good preparation. Remember that inadequate preparation always leads to unsuccessful proposals.

NCPs should prioritise their support and start by informing clients about what they can and cannot help with. Just like reviewing of project ideas, proposal preparation support can be done through different levels of support, as detailed below:

A user-friendly checklist template for proposal preparation support is provided in Annex 3.

6.3 Pre-proposal and Final Proposal Check

In the context of the NCPs mission to advise and assist, you will receive requests regarding the checking and pre-reading of proposals. Final proposal checks offered by NCPs consist of the validation and the feasibility of the proposals.

The checklists provided below and in Annex 3 will enable NCPs to verify that:

- a proposal complies with all eligibility criteria;
- a proposal uses the correct templates as found in the respective guide for applicants.

The checklist supplied here for NCPs should be used together with the relevant guide for applicants published by the European Commission.

Key tasks for final proposal check

A more user-friendly checklist template for proposal check is provided in Annex 3.

Tasks	Recommendations
Give deadlines to the researchers for the proposal check process	Take into account the time for the NCP to read and check the proposal and the time for the researcher to modify the proposal based on the NCP recommendations.
Ask the researcher to specify which parts (most likely all) of the proposal she/he wants the NCP to check	If no particular parts are specified, check all of the proposal.
Check the eligibility of the proposal	Refer to the Guide for applicants • Verify the correct completion of Part A and B on EPSS • Check the relevance of the proposal to the topic • Check the relevance of the funding schemes (Refer to the Work Programme) • Check the eligibility of the consortium (Refer to the Rules for participation, and the Work Programme) • Check the budget complies with the funding limits of the EC contribution requested (Refer to the Work Programme) • Check the maximum page length and structure of the proposal
Check the evaluation criteria	Read the proposal from the perspective of an evaluator. Consider the template given in the guide for applicants. **Scientific and/or technical excellence of the proposal** • Soundness of concept and quality objectives (Is there a clear description of the concept and objectives? Are the objectives measurable; which hypotheses lead to the project?) • Progress beyond the state of the art; (is the proposal an improvement of state of the art in the field?) • Verify the quality and effectiveness of the methodology and the associated work plan • Verify the accuracy of the comparative perspective and the European coverage **Implementation of the proposal** Verify the quality and efficiency of the implementation and the

	management.
	
	• Verify the structured of the work plan; (how will the objectives be achieved?)
	• Check the appropriateness of the management structure
	• Consortium composition (verify that it's a good balance in the light of its geographical and expertise composition)
	• Breakdown of budget and resources (check the accuracy of the calculations (e.g. person months in the description of work packages and summary of staff effort)
	• Provide Pert and Gantt diagrams
	• Provide work package and deliverable lists.
	
	Impact of the proposal
	Check the potential impact through the development, dissemination and use of project results.
	
	• Does the proposal address:
	  o the impact mentioned in the work programme? (Activity/Area/Topic)
	  o the scientific objectives?
	  o the contribution to the European level? (the reasons why the future project needs to be carried out at the European as opposed to national level)
	• Is there suitable management of intellectual property issues and appropriate dissemination strategies? (and/or exploitation of results)
	• Are ethical issues addressed? (verify the completion of the table)
	• Are gender aspects considered? (is gender well-balanced regarding the staff composition and the proposal per se)

7. Databases

NCPs need the proper tools to map FP7 opportunities with potential clients (SME, researchers, NGOs, etc.) in their country as well as internationally. To communicate with their clients NCPs create and use client databases. Client databases can capture client's feedback to increase the NCPs understanding of their clients needs, and provide them with specific targeted information on calls, events, and other activities that are of relevance to individual clients. Research directories are public databases containing profiles of researchers and research institutes. NCPs can use directories to assist their clients in finding international partners, and to publicise their profiles.

This chapter will provides details on how client databases can be created, the main features and the benefits of having a client database, case studies of an advanced client database and the N4S research directory. In all use of databases, make sure that the use of data complies with relevant national and EU legislation on personal data protection.

7.1 Client Database

A well-developed database is a useful tool as it allows you to update your contacts and their specific information over time, so that your database grows in size and value. It gives the opportunity to quickly identify potential partners, invitees for specific events, and sources of specific research expertise when necessary. The more detailed the information, the easier it will be for an NCP to recognise the specific and most relevant information to target to clients.

NCPs can use a client database to:

- **Create a network of possible partners prior to new calls**
- **Keep track of all the contacts on national and international levels**
- **Clearly define the target groups for each new call**
- **Invite the relevant people/organisations to meetings/events (advertising FP7 calls, brokerage events, fairs, etc.)**

Usually, an organisation has a mailing list, and this could be divided by themes of interest. Emails should be targeted to interested clients with useful information on events, calls, themes, information days, etc. Emails should be tailored to the specific interests of the target audience. They also act as a useful tool to promote your organisation, your own work, and the different activities of the Framework Programme.

A client database contains a significant level of information which could include:

- **The full names of the organisations or persons**
- **Contact details, personal contact details, link to web page, phone, email, fax**
- **Type of institution (SME, university, research organization etc)**
- **Research themes interested in/ interested field within FP7**
- **Previous participation in international projects, etc.**
- **Project experience (project info – link to persons and organizations)**
- **Projects funded under FP7 or previous Framework Programmes**
- **The professional networks the clients or institutions are members of**
- **The professional organisations they are affiliated to**
- **Track record of NCP contact with that person**

Additional sources of information which you can use to populate your database include:

- Participation at organised events (meetings, trainings, brokerages, exhibitions);
- Details of successful projects in particular the project participants
- Unsuccessful proposal participants who might need future coaching

The European Commission uses advanced databases to inform NCPs on the new calls, to contact coordinators of the current projects, and to find experts in particular fields.

When a new FP7 call is announced, NCPs can use their client database to select the clients for particular topic, subtopics, etc. Additionally, the NCP can select clients with special interests to mail them information or call them in person.

A clearly developed database gives NCP the opportunity to quickly identify potential partners, invitees for specific events, and sources of specific research expertise when necessary. The more detailed the information the easier it will be for you to recognise the specific and most relevant information you can target your clients with.

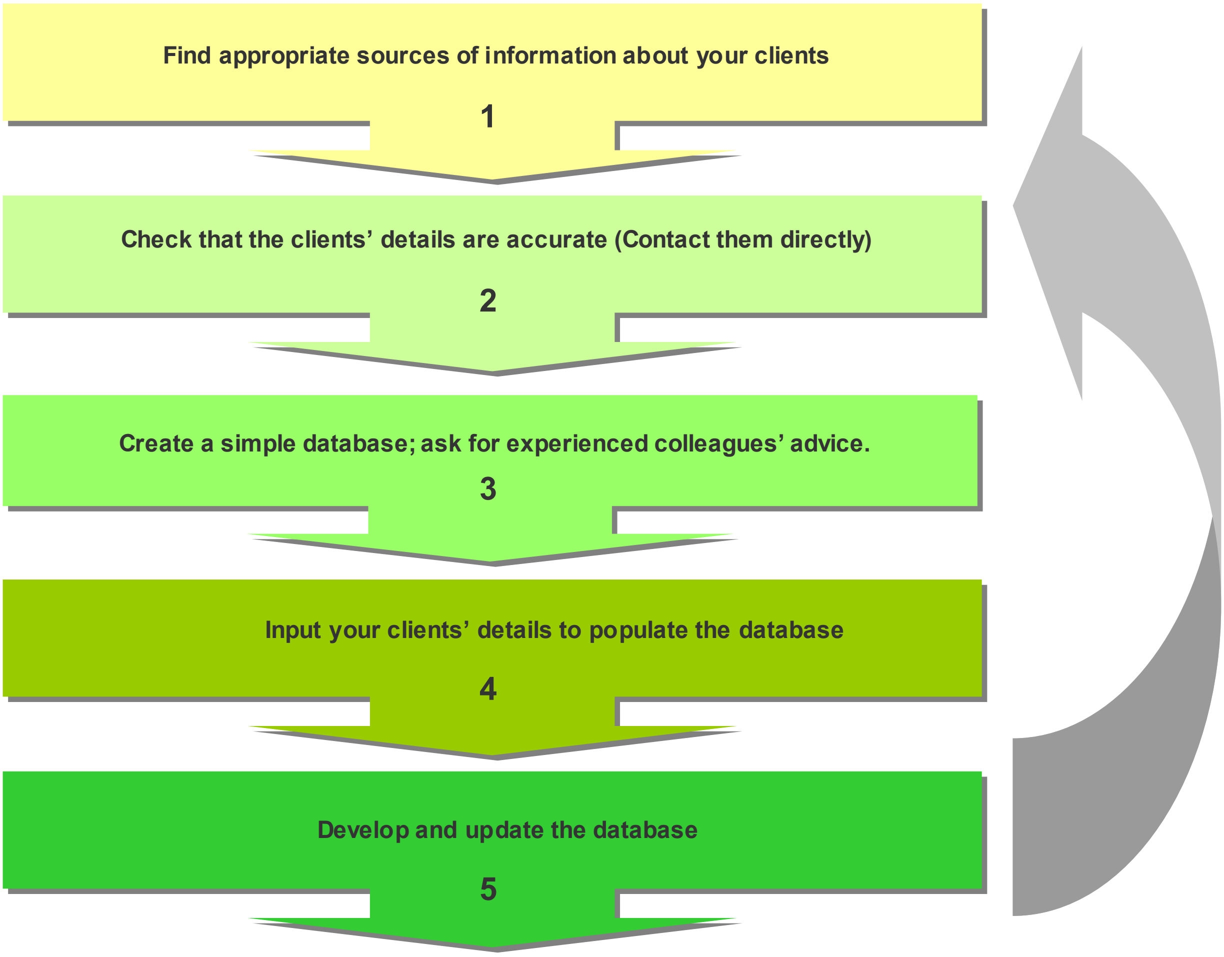
A client database enables an NCP to create specific mail lists for targeted information, and will help reduce blanket emails and avoid overburdening researchers with information which they may come to regard as spamming.

A client database will enable an NCP to :

- **Create e-mail lists of clients and keep them informed**
- **Organise subscriptions for regular clients**
- **Identify relevant potential clients in advance when organising important events**
- **Inform clients as soon as you new calls for proposals are launched**

Client databases help NCPs to send targeted information to the clients, to monitor the participation of clients in calls and different related events, so that NCPs can rely upon this information for further improvement of their work with the community.

Five steps to establishing a basic client database

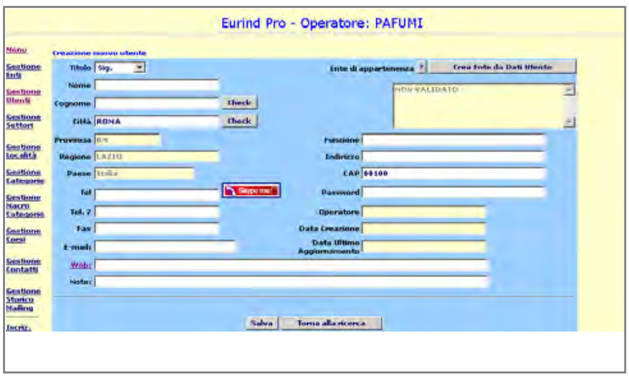


Case study: How to create an advanced Client Database

Many NCP agencies use advanced client databases, to effectively communicate with their clients. APRE the Italian Agency for the Promotion of European Research uses EurindPro software, for management of their client contacts and communication with their customers. This case study also describes the processes of other systems connected to Eurindpro, such as Internet and Intranet and the APRE website.

The Eurindpro system maintains an open database of customers and enables APRE to conduct timely and targeted communications with their customers.

Adding clients



Information about clients is entered directly by APRE staff through a special function of Eurindpro. In addition to personal data, information on the customer's organisation, and contact details such as telephones, email, Skype ID, are also included. The clients institutional details are categorised within Eurindpro, so that NCPs can uniquely identify the institutions of customers and then do research and statistics on the basis of organisations, and organisation classifications.

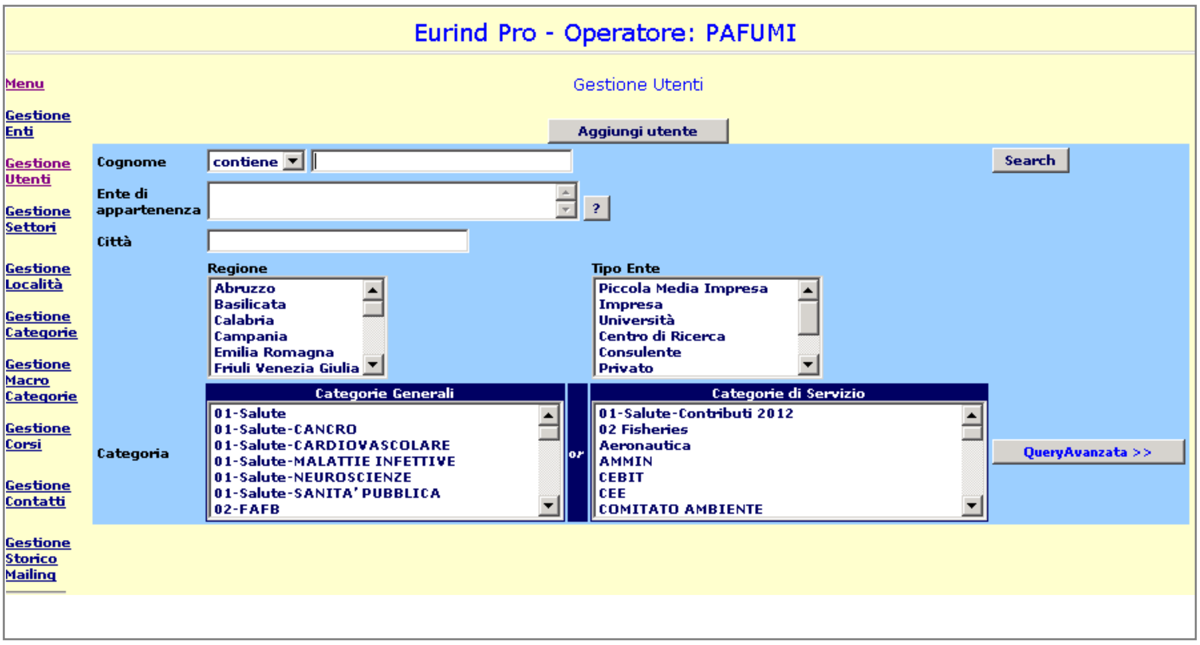
The institutions are then organized in a hierarchical structure with a maximum of three levels. Clients are assigned a system password through which they can change personal information by accessing the portal on the APRE website.

Searching the database

The database can perform specific searches choosing parameters based on the data entered such as:

- Surname
- Name of the institution
- Type of Institution
- City

Searches can also be performed on the basis of a set of tags associated with the client by the APRE staff or directly by the client themselves. The tags are categorised into "internal", that is visible and assigned only by APRE staff, and "public", that is visible to the client on the APRE Internet portal.



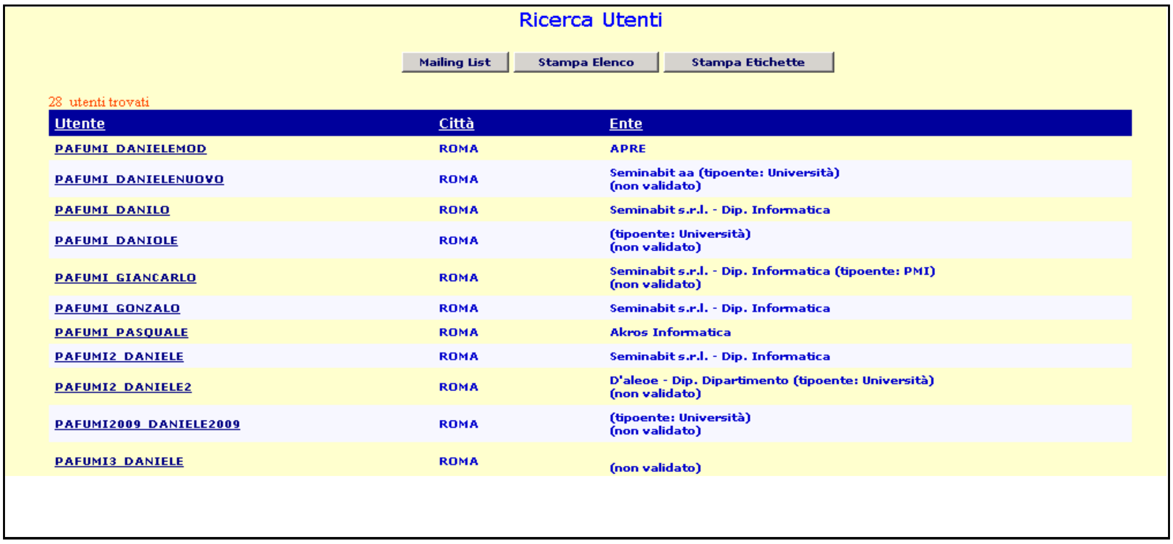
Tag search can be done with the operators “AND/OR” enabling users to perform very complex queries.

It is also possible to use an advanced mode which allows users to specify additional search parameters such as:

- Boolean operators "NOT" to exclude specified items from the search of one or more tags;
- ”Days”, to include in the search people who have participated in information days;
- EOI (Expression Of Interest) training courses, to select clients who have expressed interest in participating in training courses;
- Participation in courses, to select customers who have attended a training course.

After performing the search, it is possible to execute more operations:

- Print lists of selected contacts;
- Generate address labels;
- Send mailing lists via email.


Ricerca Utenti

Mailing List | Stampa Elenco | Stampa Etichette

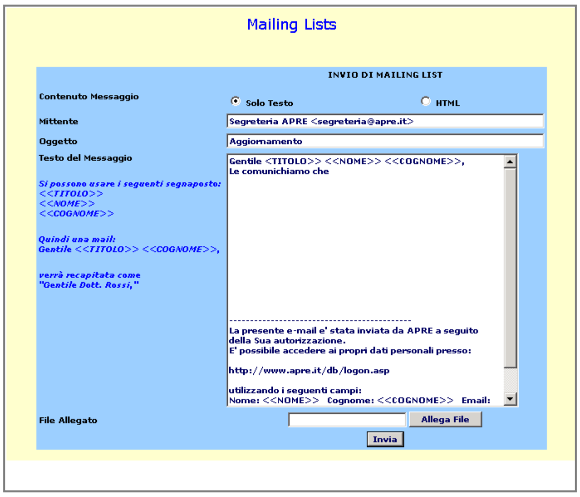
28 utenti trovati

Utente	Città	Ente
PAFUMI DANIELEMOD	ROMA	APRE
PAFUMI DANIELENUOVO	ROMA	Seminabit aa (tipoente: Università) (non validato)
PAFUMI DANILO	ROMA	Seminabit s.r.l. - Dip. Informatica
PAFUMI DANIOLE	ROMA	(tipoente: Università) (non validato)
PAFUMI GIANCARLO	ROMA	Seminabit s.r.l. - Dip. Informatica (tipoente: PMI) (non validato)
PAFUMI GONZALO	ROMA	Seminabit s.r.l. - Dip. Informatica
PAFUMI PASQUALE	ROMA	Akros Informatica
PAFUMI2 DANIELE	ROMA	Seminabit s.r.l. - Dip. Informatica
PAFUMI2 DANIELE2	ROMA	D'aleoe - Dip. Dipartimento (tipoente: Università) (non validato)
PAFUMI2009 DANIELE2009	ROMA	(tipoente: Università) (non validato)
PAFUMI3 DANIELE	ROMA	(non validato)

Mailing Lists

Once a list of clients to contact has been selected, through the search function, it's possible to send blanket communications to the entire mailing list, via e-mail.

Through the database the title and the text of the message, can be inserted, it is also possible to insert clients names or titles so that each email is personalised, for example using the name and surname of the client. The system sends a customised email for each user, without using any copy fields (Cc).



Files can also be sent with the mailing, these will be sent to the client not as a file attachment but as a web link to the content that can then be downloaded from the APRE website, thus reducing file size of the mail out, and making it more efficient. The system generates lists of all the mailing sent, quoting the author, date and time, the search parameters set and the number of selected clients for the sending, thus users can monitor what information has been sent and which client have received it, on what date, thus helping avoid duplication of mass mails.

Internet sites integration

The database managed by Eurindpro is also connected to the APRE Internet and Intranet sites, enabling integrated functionality between systems. As mentioned, the registered clients can access EurindPro independently from the Internet through the APRE portal and conduct a series of operations on their profile. In particular, clients can update their personal information, without having to communicate by phone or email with APRE, clients can also add or edit tags of interest, under which

APRE can perform searches. APRE receive period updates when such changes have been made. Thus clients have control over the personal information which the system uses to communicate with them, ensuring they receive relevant and useful information.

Eurinpro is built as a web application using Microsoft technology, and is hosted on the APRE servers and directly managed by APRE IT staff.

7.2 Research Directory

Research directories are public databases containing profiles of researchers and research institutes. They are useful tools for international collaboration, as they enable researchers and their organisations to publicise their profiles, for the purpose of partner searching and collaborative activities.

NET4SOCIETY has created a research directory specifically for SSH researchers. It is an English language online directory of researchers who are actively involved in the Socio-economic Sciences and Humanities (SSH). It is designed to facilitate research cooperation in the context of the EU Research Programme.

Why register? (and how to motivate researchers to subscribe)

The N4S research directory can be used to identify researchers who work in the area of Socio-economic Sciences and Humanities, either within the context of EU funded research or broader collaborative research and to find international partners with complementary expertise, profiles or technologies. By registering their profile, researchers will help build a map of SSH research all over the world and increase their chances of finding and being found by partners in over 40 countries in Europe and the rest of the world.

The research directory gives researchers easy access to quality information on who is active in their research field, while enabling them to share their research expertise and interests with SSH researchers in Europe and beyond. The NET4SOCIETY Research Directory is actively supported by the European Commission.

Who should register?

Researchers who are actively involved in SSH research and interested in international cooperation should register their profile in the research directory, which will help them find quality information on who is active in their research field. The research directory will be of interest to researchers who wish to share their research expertise and interests with SSH researchers around the world.

Researchers from large and small institutions, universities and private companies are all welcome to register their profiles. In order to ensure that the directory contains suitable profiles, NCPs should adopt a modular approach when deciding on whom to invite to register based on the following criteria:

1. Successful FP6 and /or FP7 coordinators.
2. Consortium members of successful projects funded under FP7 and/or FP6.
3. Researchers who participated in, or led, FP7 and/or FP6 proposals that received positive evaluations (13 points or more), but who were not funded.
4. Researchers with a good SSH research track record in other competitive national and/or international funded research (not FP6 or FP7).
5. Researchers with potential (they are good, but do not have a track record yet).

How to register

The directory is accessible via the N4S website; researchers select „Insert profile' option and then complete all the required fields in the online form.

NCPs duties in supporting the Research Directory

- The SSH National Contact Points (NCPs) need to actively contact their researchers to invite and motivate them to register on the Research Directory;
- NCPs are responsible for the quality control of information published on the Research Directory;
- They will need to approve all information before it is published. This means that NCPs have to contact researchers if any information is missing and approve the profile when the registration form is complete.

Researchers can also provide feedback on the research directory, and it may be forwarded to the respective national SSH NCP or sent via the contact link of the research directory home page.

8. Understanding the Policy and Context of the Work Programme

From a researcher's point of view, NCPs are often perceived as Eurospeak-interpreters. In order to live up to this expectation, it is essential that NCPs are not only aware of the procedures leading to the creation of a Framework Programme and – ultimately - the making of the annual Work Programmes, but also of the processes that lead to policy decisions impacting SSH research on a European level. This chapter focuses on the process behind the annual work programmes. Insight is also given on when and how to provide input that for the work programmes. Moreover, the question "who should I connect with, which communication lines are essential for successful NCP work" will be answered in this chapter.

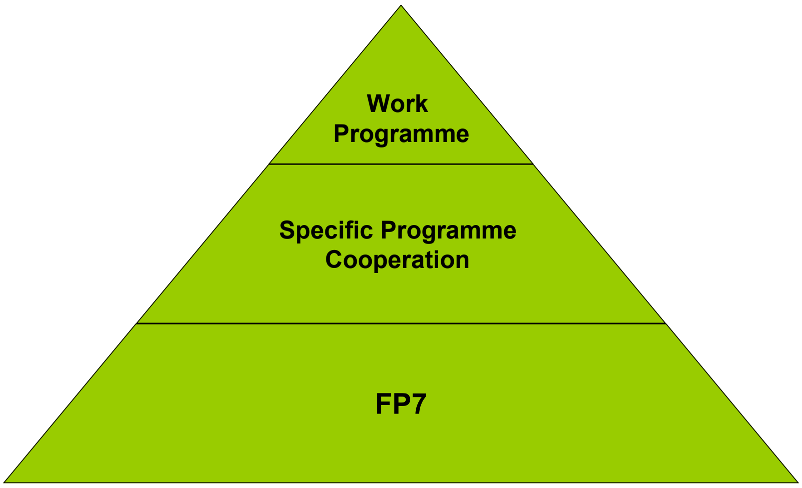
8.1 Understanding the Work Programme Process

In order to understand the work programme process, one must first understand the reasoning behind FP 7. The objective of the Framework Programme is not to advance research in and of itself but to utilise research as an instrument for ensuring Europe's competitiveness vis-à-vis the United States and Asia, i.e. ensuring economic growth, creating jobs, encouraging cohesion etc. EU research is a policy instrument.

Once this policy objective has been understood, it quickly becomes apparent why overall EU policy strategies have such an impact on FP7. While the Lisbon Strategy had a major impact on FP6 and the early stages of FP7, the EU 2020 Strategy is now deemed to have great impact on the last Work Programmes of FP7.

With this is mind, a moments time should be given to the Specific Programmes - in the case of SSH, the Specific Programme "Cooperation" (SP-C). The SP-C is the cornerstone of the work programmes (WP). The Commission has the mandate to take up all topics set out in the SP-C and this is the guiding document for all WPs within FP7. The Commission has the mandate to adhere to the structure and headings set out in the SP-C. It is very difficult, if not impossible, to install topics that have no link to the SP-C in any given work programme.

In regard to the preparation of the WP, the Commission has the right of initiative. With the exception of the Programme Committee and the European Technology Platforms – the Commission is not legally obliged to seek external consultation. That being said, reality is once again a different shade of gray. The Commission receives input at various stages from various sources during the WP preparation process. Success is often a matter of timing and strategy.



Keeping in mind the abovementioned points, we will focus on the actual WP preparation cycle:

The work programme process – with few exceptions – follows an annual cycle. The entire cycle spans approximately 12 months. Since the WP publication is one year ahead of its implementation (e.g. the WP 2012 is published in July 2011), the preparation of the 2013 WP will begin in late summer 2011. The process for next WP begins almost immediately after the publication of the annual WP. The primary consultation process takes place in autumn.

The consultation phase is followed by the Commission's drafting and internal consultation phase. The research Directorate Generals – DGs (Research, Enterprise, Transport, Information Society and the Joint Research Centre) have to liaise with the policy DGs (Education; Health; Environment; Agriculture; Fisheries etc.). Policy DGs give input in regard to their particular research needs. The horizontal Directorate Generals (Budget; Legal Services and the Secretariat General) are also involved in the internal consultation process.

In parallel, informal discussions with the PC are often initiated at this time. National PC members frequently provide the Commission with suggestions for the WP; they may join forces with other PC representatives to give their proposals more clout. The Commission may provide the PC with confidential insights on the direction of the WP. It is also standard practice that the Commission requests the PC's comments on the first informal draft of the WP.

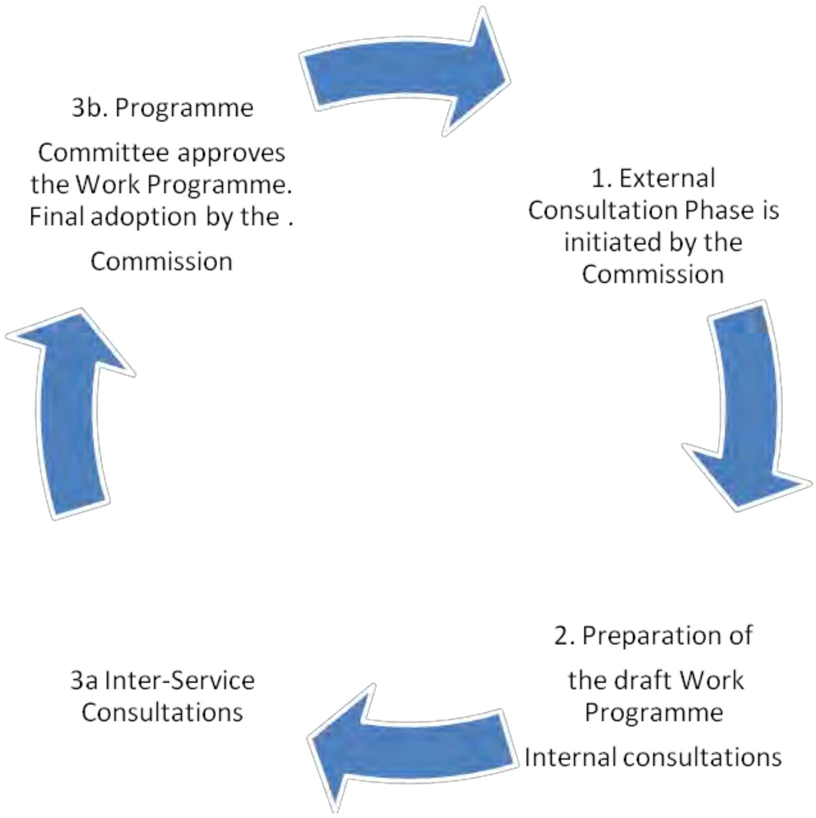
Once an official draft of the WP exists, it is extremely difficult to give significant input. Nonetheless, changes are possible and minor modifications are usual (minor text changes often have a significant impact on the focus of a given topic).

The last phase of this cycle is the adoption phase, which is initiated by the inter service consultation. At this time the Directorate Generals (DGs) are formally consulted. The DGs have the possibility to block the adoption of the WP. Usually this phase takes about one month; under the current time schedule this takes place in May.

The Commission's draft can sometimes be slightly revised after the inter-service consultation, however, this is normally avoided, thanks to an earlier process of the informal consultation with the policy DGs. The revised draft is then presented to the PC for formal approval.

After the PC has given its approval, the Commission adopts the WP. The WP is now ready for publication.

The Work Programme Cycle



Main players:	Further forms of external consultation:
• Expert Advisory Board[1] • Programme Committee • Policy Expert Groups • ERA-NETs	• Web-based consultations • Work Shops • Conferences • Other events

Summary

Finding the right timing, the right packaging and the right doses for useable input is not always easy. It is important to keep in mind what kind of information the Commission can use, what information is relevant, what is useable and what is too much. PC members have the possibility of influencing the direction of a topic or even a WP; therefore PC members should be a first point of contact for NCPs when attempting to provide the Commission with WP input. Contact, however, should not exclusively be reserved for the PC - other well connected stakeholders should also be involved. It is also advantage to build personal contact to relevant project officers, who, in essence, hold the responsibility for writing the topic texts. This is a process and doesn't happen overnight. Attending EU workshops, conferences and other events where the Commission are present, gives a first opportunity to establish communication lines with the Commission.

Timing is of essence when it comes to presenting input – in general this means that as soon as a WP has been adopted input for the following year's WP should be provided to the Commission.

[1] The Thematic Programmes of SP-C, have set up respective Advisory Boards to provide scientific advice to the Commission. Experts are chosen at the discretion of the Commission in their personal capacity and do not represent an organisation or country. Members of the AG can be found on: http://ec.europa.eu/research/fp7/advisory_en.html

However, it is also of utmost importance to establish a strategy and a network for this process. Single-handed initiatives tend to have less impact than concerted efforts. Make use of the possibilities that N4S and other networks offer you.

8.2 Communicating with Brussels

The role of the NCP involves many forms information dissemination, this guidebook introduces NCPs to the many sources of information (chapter 2) and gives advice on how to communicate that information to researchers, through promotions (chapter 3), events (chapter 4) , and consultations (chapter 6).

NCP's are in direct contact with researchers on a daily basis and as such NCPs receive direct feedback on how the Framework Programme is perceived by researchers and changes they would like to see in future programmes. It is also within the NCP's remit to give feedback to the Commission services on any problems and difficulties in implementing and participating in the Framework Programme. This section of the handbook describes some of the mechanisms in place which NCPs can avail of to communicate with Brussels.

Commission NCP Contact

NCPs can contact the commission directly with comments and questions on the work programme and FP7. There is an SSH NCP contact person in the commission. The NCP contact is an officer delegated as the first point of information for all NCPs. The SSH unit within the commission has appointed Ms Elisabeth Brando as NCP contact (November 2010). The NCP contact officer can assist NCPs in initial questions specific to the SSH work programme, and open calls. This service would also complement CORDIS enquiries web services where you can email specific FP7 questions for an email response, and can provide SSH specific information.

The Programme Committee

Section a in this chapter describes the processes under which the work programme is created, and the programme committees role within this process. The programme committee is composed of the national delegates and experts for all the member states and associated countries participating in FP7. The programme committee plays an important role in the approval process of the work programme, members vote and have to agree on the Commission's management of programmes. The Programme Committee checks how the Commission manages the programme and feeds in ideas and suggestions.

NCPs can give feedback on issues related to FP7 through the national delegates of the programme committees.

It is important that the national delegates and experts are aware of any issues, suggestions or feedback from the research community that could shape or influence the work programme. The NCP should communicate with their respective national delegates and experts, supplying them with information and input from the research community.

The Commission works with all Member States and is therefore often interested in challenges that occur in more than one Member State. If the issues an NCP raises are affecting researchers in many member states then it is important that all NCPs bring these issues to the attention of the programme committee members. The more members of the programme committee who support specific interventions, the stronger the case for implementing improvements and changes. NET4SOCIETY is a forum where NCPs can discuss issues which should be raised with programme committee members.

Remember! Programme Committee members vote to agree the Work Programme and are an important group for shaping future work programme directions.

Representations in Brussels

All members' states and associated countries of the European Union have permanent representations based in Brussels. The role of the permanent representations is to represent their country in the European Union. Many member states also have Liaison offices with a specific research and technological development (RTD) remit. Each country will have varied representation in Brussels; some have research agencies representations; however all will have some degree of representation in Brussels. These representatives and liaison officers have direct contact with the European Council, Parliament and Commission, and are a resource each NCP should be aware of.

Each Member State has a representation in Brussels.

IGLO is an informal association of Brussels-based non-profit R&D Liaison Offices. The aim of IGLO is to facilitate and enhance the interaction, information exchange and co-operation between Members of IGLO, their national research systems and the European institutions on issues related to EU RTD, in particular, the Framework Programme.

There are currently 21 national representations participating in IGLO. Their various activities contribute to facilitating and to strengthening the interactions, exchange of information and cooperation between IGLO Members, their national research systems and the European Institutions. IGLO have a number of working groups, which serve as pools of expertise and allow for the mutual exchange on specific topics, and can involve the respective contact persons from the European Commission, the European Parliament or the European Council. Working groups have been established in many areas including

- FP7 monitoring
- International co-operation
- Innovation
- Mobility of researchers and code of conduct
- European Research Council
- European Technology Platforms / Joint Technology Initiatives

In engaging with the Liaison officers, NCPs can input feedback from the research community through the specific working groups and other forums in which the liaison officers participate.

Summary

NCPs are vital for researchers, to guide them through the complicated maze that is FP7. For an NCP to be effective and useful it is crucial that we understand how FP7 and the commission works and know when and where to both find and feed in information. The above listed groups are not an exhaustive list, but they are an essential first port of call for an NCP to communicate and relay the important SSH research message to Brussels. Starting with the NCP contact in the commission, through to the national delegates, and the liaison officers, NCPs have many opportunities to input feedback on SSH research issues which they encounter in their NCP activities.

Annex 1: Glossary

AC	Associated Country
BSG-CSO	Benefit for Specific Groups – Civil Society Organisations
CA	Consortium Agreement
CIRCA	Communication and Information Resource Centre Administrator
CIP	Competitiveness and Innovation Programme
CFC	Community Financial Contribution
CFS	Certificate on Financial Statement
CoM	Certificate on Methodology
CORDIS	Community Research and Development Information Service
CP	Collaborative Project
CSA	Coordination Support Action
CVT	Central Validation Team
DG	Directorate General
DG-RTD	Directorate General for Research and Technological Development
EC	European Commission
ECAS	European Commission Authentication Service
EPSS	Electronic Proposal Submission System
ERA	European Research Area
ERA-NETs	European Research Area Networks
ESF	European Science Foundation
ESR	Evaluation Summary Report
EU	European Union
EURATOM	European Atomic Energy Community
ETP	European Technology Platforms
FLA	Forward Looking Activities
FORCE	Form C Editor
FP	Framework Programme
GA	Grant Agreement

GPF	Grant Preparation Forms
HERA	Humanities in the European Research Area
ICPC	International Cooperation Partner Countries
INCO	International Cooperation
IPR	Intellectual Property Rights
JRC	Joint Research Centre
JTI	Joint Technology Initiatives
LEAR	Legal Entity Appointed Representative
LO	Legal Officer
METRIS	Monitoring European Trends in Social Sciences and Humanities
MS	Member State
NCP	National Contact Point
ND	National Delegate
NEF	Negotiation Facility / Forms
N4S	NET4SOCIETY Network for SSH NCPs
NoE	Network of Excellence
NORFACE	New Opportunities for Research Funding Agency Co-operation in Europe
PIC	Participant Identification Code
PC	Programme Committee
PO	Project Officer or Policy Officer
REA	Research Executive Agency
R&D	Research and Development
RTD	Research and Technological Development
SESAM	European Commission online reporting tool for Research and
SME	Small and Medium-sized Enterprises
SSH	Socio-economic Sciences and Humanities
TOR	Terms of Reference
URF	Unique Registration Facility
WP	Work Programme

Annex 2: Useful Websites

DESCA	www.desca-fp7.eu
ECAS	https://webgate.ec.europa.eu/ecas
EUROPA	www.europa.eu
IPR Help Desk	www.ipr-helpdesk.org
Research Enquiry Service	http://ec.europa.eu/research/index.cfm?pg=enquiries

NET4SOCIETY	www.net4society.eu
CORDIS	http://cordis.europa.eu/fp7/home_en.html
CORDIS partner search	http://cordis.europa.eu/fp7/partners_en.html
DG RTD social sciences	http://ec.europa.eu/research/social-sciences/
CIRCA	http://circa.europa.eu/
METRIS	www.metrisnet.eu
ERA-WATCH	http://cordis.europa.eu/erawatch/
NORFACE	www.norface.org
HERA	www.heranet.info
Ideal-IST partner search	www.ideal-ist.net/partner-search
Fit for Health Network	www.fitforhealth.eu
Enterprise Europe Network	www.enterprise-europe-network.ec.europa.eu
European Sociological Association	www.europeansociology.org
European Science Foundation	www.esf.org/research-areas/humanities.html
COST	www.cost.esf.org
NET4SOCIETY Research Directory	www.net4society.eu/research-directory

Annex 3: Useful Checklists for NCPs

1. Checklist for Creating an SSH Newsletter

1. Operational requirements and accessibility			
Task	**Recommended actions**	**Scheduled date of completion**	**Actual date of completion**
Newsletter accessibility / Technical format planning.	• Open standards software formats agreed; • Pure text format is preferable for e-mail; • Copy of the newsletter on website; • IT-administrator involved in planning and technical aspects of production and distribution.		
Printed and electronic newsletters should be available on the web.	• Published on National SSH NCP website; • An archive of former published newsletters available on website; • Newsletter available in html and PDF format.		
The newsletter should be up to date and published regularly.	• Agree number and schedule of issues per year; • Agree time from production of content to publishing.		
2. Distribution lists and collection of addresses			
Task	**Recommended actions**	**Scheduled date of completion**	**Actual date of completion**
Use up-to date and accurate database information to select target organisations and individual recipients.	• Link distribution of the SSH newsletter to central contact database; • Finalise comprehensive distribution list; • Insert a personalised greeting (e.g. "Dear Dr. House…").		
Respect formal regulations for mass distribution of emails.	• Agree consent from newsletter recipients; • Use the Blind Carbon Copy (Bcc) field, to assure confidentiality of your recipients' email addresses.		

3. Basic content			
Task	**Recommended actions**	**Scheduled date of completion**	**Actual date of completion**
Introduction and table of contents.	• Highlight the most important news in the introduction; • Provide a list of content at the start of the newsletter; • Link table of contents to actual text via e-navigation links.		
Contact information and NCP service.	• Insert names and contact details (phone/e-mail) for the NCP and the NCP organisation; • Insert links to the NCP section on your website for further information.		
Unique content.	• Emphasise focused information relevant to the main national target group; • Provide insider information and analysis. Do not just repeat the information supplied by CORDIS and the newsletters published by DG Research; • Double-check all information sources.		
Funding possibilities.	• Provide information on forthcoming calls from FP7 programmes with relevance for SSH researchers; • Provide call overviews for relevant ERA-NETs, JPIs etc.; • Insert links to relevant work programmes, guidelines and description of details.		
News.	• Provide short news articles on EU research / SSH research; • Develop a calendar with information on future calls and events.		
Events and training.	• List information on national and international training courses, conferences and events in the SSH area; • Provide links to further information and registration.		
Partner search.	• Give updates on the latest partner searches; • List links to useful websites, NET4SOCIETY and CORDIS partner search tools.		
Disclaimer.	• Include a disclaimer at the end of each newsletter with option to be removed from the mailing list.		

4. Optional content			
Task	**Recommended actions**	**Scheduled date of completion**	**Actual date of completion**
Photos and illustrations.	• Insert relevant and interesting photos and illustrations.		
News and policy documents.	• Provide links to selected news articles on policy issues and policy documents.		
Funding outside FP7.	• Provide updates on funding possibilities outside FP7.		
Presentation of co-operation partners.	• Profile partnerships of the month, maybe from abroad; • Focus each issue on a country and present the key players; • Publish success stories: present the people behind the project.		
Articles from NCP colleagues.	• Show possibilities for cooperation; • Provide interesting anecdotes and/or perspectives.		
Statistics and project results.	• List key numbers from most recent calls - number of applications / number of financed projects etc.; • Provide short descriptions of results from financed projects.		

2. Checklist for NCP Websites

1. Operational requirements			
Task	**Recommended actions**	**Scheduled date of completion**	**Actual date of completion**
The website should be accessible by a basic computer.	• Open standards software formats agreed; • IT-administrator involved in planning and technical aspects of production.		
The website should be easy to update and be adaptable to technological advances.	• Agree technical solutions that are easy to both administer and use, and are adaptable to technological advances; • Consult your local IT-administrator in order to assure that the technical solutions are compatible with the standards used in your host organisation.		
The website should be easy to find.	• Link website to other national EU research web pages and web pages containing information on national SSH research; • Promote website through other channels of communication to the target group e.g. emails, newsletters and brochures; • Establish an appropriate URL address for the website.		
The website should be easy to understand and navigate.	• Simple and clear information in the national language; • Provide some information in English; • Establish a clearly identified website structure using sections, intuitive menus and navigating tools.		

2. Basic Content			
Task	**Recommended actions**	**Scheduled date of completion**	**Actual date of completion**
General information.	• Write introduction to EU research, FP7 and the SSH programme; • Write general descriptions of the NCP service.		
Funding possibilities.	• Provide call overviews for the SSH e and other FP 7 programmes with relevance for SSH researchers; • Provide call overviews for relevant ERA-NETs; • Create links to the latest Work programme and related documents; • Provide relevant website links		
News.	• Link to news articles on EU /SSH research; • Create a call and event calendar; • Publish national SSH NCP newsletter.		
Events and training.	• List information on available training courses; • List information on national and international conferences and events in the SSH area.		
How to get support?	• List of national NCPs and FP7 advisors in the research institutions; • Describe services offered by the NCPs and other advisors; • Detail available financial supports; • Link to EC research enquiry service.		
Legal and financial issues.	• Provide advice on legal and financial issues. • Link to other sources of information.		

Links (see annex with relevant links for the specific URLs).	• Create links to:
	  ○ CORDIS;
	  ○ CORDIS newsletters;
	  ○ DG research;
	  ○ EC Publications office;
	  ○ ERA-NETs (relevant for SSH);
	  ○ National websites related to SSH research;
	  ○ NET4SOCIETY website.		

Further sources of information.	• Allow uses to subscribe to news updates and newsletters; • Provide an archive of newsletters.		
Contact information.	• Provide contact details for the NCP and the NCP organisation.		

3. Additional content of a more advanced website			
Task	**Recommended actions**	**Scheduled date of completion**	**Actual date of completion**
General information.	• Provide downloadable information packs.		
Funding possibilities.	• Describe and provide links to all European research funding possibilities; • Provide links and updates of public tenders; • Describe funding schemes relevant to SSH (aim, activities, budget, size, duration).		
News.	• Provide an online subscription to news updates from the NCP website.		
Events and training.	• Create online registration for trainings; • Publish summaries, documentation and photos from previous events.		
How to get support?	• Publish how to guides in proposal writing, legal and financial affairs, IPR etc.; • Create an online help desk – inquiry form.		
Legal and financial issues.	• Publish Info material and/or links: ○ Guide to financial and legal issues; ○ How to prepare your budget; ○ Legal issues; ○ IPR; ○ DESKA model consortium agreement.		
Statistics and results.	• Prepare call results from the SSH programme; • Provide statistics on the number of applications and financed projects for the SSH programme; • Provide abstracts of funded proposals.		
Case studies.	• Write case studies. • Publish success Stories including testimonials of successful researchers.		
International research institutions.	• Provide links and short descriptions to relevant international research institutions.		
Policy documents.	• Provide policy via links or downloads; • Link to presentations and speeches by official representatives from national ministries, research institutions, research administrative agencies and the EU institutions, etc.		

Task	Recommended actions	Scheduled date of completion	Actual date of completion
Partner search (see also chapter on partner search).	• Provide an online tool for submitting partner searches to be distributed through the NCP network; • Link to NET4SOCIETY partner search tool and research directory; • Link to CORDIS partner search and other relevant partner search tools.		
FAQ and search tool.	• Create a page with FAQs; • Create a search tool for searching the content of the national EU research website and/or SSH NCP website.		
Further sources of information.	• Provide online registration to client database; • Provide subscription to news updates; • Upload info session DVDs or webcasts; • Create an order form for printed information material.		
Contact information	• Provide profiles and photos of the NCPs.		
Interactive services.	• Create discussion forums; • Provide interactive guides, templates and tests; • Link to profiles on social networks.		

3. Information day / Workshop / Seminar Organisation Checklist

Task	Details / Recommendation	Done (√)
Define the aims and objectives.	Is it pure information on the call? Or also promotion of the NCP organisation? Encouragement? Networking? Matchmaking? *Timing suggestion: 3/4 months before the event*	
Determine the target audience.	Researchers/ Administrators / Consultants / Civil Society organisations. *Timing suggestion: 3/4 months before the event*	
Define the content: e.g. agenda.	Consider audience expectations 7 directly relate the programme to these. *Timing suggestion: 1st draft 3 months before the event*	
Fix the date.	Check the speaker availability on rank of importance e.g. EC officials availability first, then the venue etc. *Timing suggestion: 3/4 months before the event*	
Compose the team responsible for the organisation.	Identify outside co-operation partners. Use each other as dialogue partners.	
Estimate the costs. **Estimate the income.**	Budget for: • Premises; • technical equipment; • food & drinks; • advertising; • printing of documents; • mail campaigns; • transport; • symbolic gifts for speakers; • travel/accommodation expenses for speakers; • other. *Timing suggestion: 3/4 months before the event*	
Prepare the organisation schedule.	Pick and chose the relevant items from this checklist, add new items, add the envisaged dates you want to complete tasks by.	
Determine the assessment criteria for post evaluation.	Prepare a feedback form to be distributed at the event for assessment of the info-day.	

Task	Details / Recommendation	Done (√)
Choose a venue and make reservations.	Consider budget and transport options *Timing suggestion: 3/4 months before the event*	
Reserve equipment.	• Computer or laptop; • Projector, Screen & laser pointer; • flip charts / white board; • microphones and audio; • internet connection; • confirm what tools speakers require. *Timing suggestion: 1 month before the event*	
Order catering services.	Estimate attendance numbers in advance and closer to the event supply final catering numbers.	
Speakers.	• Choose speakers, EC / NCP / ND/ Successful local participants; • Issues speaker invitations; • Ask speakers to provide biographies detailing their relevant expertise; • Organise speakers' transport, hotel and restaurant reservations; • Brief speakers of the purpose of the event; • If possible obtain their speaker PowerPoint presentations before the event. *Timing suggestion: Choose and invite speakers 3/4 months before the event; all other tasks can be 1 month before the event*	
Brief the chairperson.	• Introduction of the event; • Presentation of the agenda; • Presentation of the speakers. *Timing suggestion: 1 week before the event*	
Create the targeted audience mailing list.	*Timing suggestion:3/4 months before the event*	
Send advertisements and advertising inserts for publication.	Use appropriate media e.g. • national or local press; • university publications; • federations, researcher targeted magazines; • NCP website and newsletters; • Identify other organisations who can also promote the event. Suggestions: plan several rounds of dissemination until the last week before the event itself and highlight the date. *Timing suggestion: start 3 months before the event*	

Task	Details / Recommendation	Done (√)
Send out invitations.	• letter and agenda, with contact details or targeted direct e-mails instead of printed letters. *Timing suggestion: start 3 months before the event*	
Register participants.	If possible use online registration and enter participant's details in your NCP client database. *Timing suggestion: As soon as possible*	
Information to participants.	Send a registration confirmation and location map to participants.	
Draw up the list of participants.	*Timing suggestion: 2 days before the event*	
Prepare the information package.	• Programme leaflet; • List of participants; • Speakers' biographies; • Evaluation form; • NCP information material; • Other items, e.g. an NCP newsletter request form, work programme, or call documents e.g. the guide for applicants or the call fiche. *Timing suggestion: 3 to 5 days before the event*	
Prepare identification/access.	• Name badges; • Speakers' name cards. *Timing suggestion: 3 to 5 days before the event*	
Presentations.	• Prepare slides and other material; • Collect slides from the speakers; • Upload the presentations on the laptop the day before the event and check if it works properly. *Timing suggestion: start asking 2 weeks before the event*	
Before the event.	• Organise the welcome (distribute the tasks, registration of participants, handing out documents); • Check the layout of the room; • Install and check technical equipment; • Put up signs, & speakers' name cards. *Timing suggestion: 1 day before the event*	

Task	Details / Recommendation	Done (√)
During the event…	• ensure you are a speaker; • meet and speak with as many contacts as possible; • collect feedback forms.	
After the event retrieve and return…	• all technical equipment; • presentation supports (USB); • forms and badges; • unused documentation.	
Send the information package to people who registered but did not attend.	*Timing suggestion: within 1 week after the event*	
Thank the speakers.	*Timing suggestion: within 1 week after the event*	
Possibly: collect media event coverage.	*Timing suggestion: within 2 weeks after the event*	
Assess the event on the basis of the organisation team's appreciation and the evaluation forms.	*Timing suggestion: within 2 weeks after the event*	
Possibly: write a brief article for the NCP newsletter.	*Timing suggestion: within 1 week after the event*	
After the event…	Retrieve and return: • all technical equipment; • presentation supports (USB); • forms and badges; • unused documentation.	
Thank the speakers.	• Send email / letter; • Send tokens of appreciation.	
Assess the event.	• Review the feedback forms; • Consider the predefined criteria for the event.	

4. Brokerage Event Organisation Checklist (can be used with info day checklist)

Before the event		
Task	**Details /Recommendations**	**Done (√)**
Distribution of tasks among brokerage event organizers.	Pay attention to ambition and skills of organizers in the matter of distribution of tasks.	
Set the Date.	Take into account: • Competing events at the same time; • Public Holidays and proximity to holidays.	
Find a suitable venue.	Available meeting rooms for the event - centrally located, easily accessible, adequately equipped.	
Set the Draft Agenda.	Keep the programme related to the audience.	
Identifying potential speakers.	Regard the expertise of EC officials and academicians on related FP7 Area. Prepare the invitation letter for speakers. Send invitations to the speakers.	
Identify and brief moderators for parallel sessions.	Availability of EC officials and academicians from related area on the date of Brokerage Event is important.	
Prepare guidelines for moderators.	They will have needed to know what is expected from parallel sessions.	
Brief the experts about their expected contribution and the target audience.	Important for the success of the event and the efficiency of the sessions.	
Ask to the experts brief CVs to be made available for the moderators.	CVs are significant to first impression about the experts on the minds of the audience.	
Launching event web tool.	Choose the best tool to fit the concept and context of the event.	
Announcement of the event as early as possible.	6 months preparation phase.	
Preparation and periodic update of Clients Database.	Crucial for the willingness of new participants to join the event, and for the establishment of environment where even before the event, participants get a chance to know the others.	

Promotion of the event via newsletters, press releases, leaflets and promotion e-mails.	Enhance the chance to reach the broadest audience on related FP7 area.	
Information to national stakeholders during national events or face-to-face meetings.	A successful Brokerage Event is important not only for the international partners, but also for the researchers of the host country to get a chance to meet the colleagues from all over the world.	

During the event		
Task	**Details /Recommendations**	**Done (√)**
Registration desk.	Take notice of the desk not only the morning, but during the whole day because participants may join the event anytime.	
Timetable for tasks allocation.	A fair and exact schedule on timetable for tasks allocation will raise the efficiency and ambition of the organizers.	
Organising the bilateral sessions.	The vital part is the length of the bilateral sessions. The better way is to keep longer for the exchange of information among researchers for cooperation, shorter to provide equal chance to all participants on meeting with other researchers.	
Getting Feedback about the event.	Feedbacks from participants are the best and most credible indicators on reflecting the success of the event.	

Brokerage Event Agenda		
Task	**Details /Recommendations**	**Done (√)**
Plenary session.	Get first hand information by EC Officials on current FP7 Call.	
Parallel session.	Provide information on the specific topics under current FP7 call by experts. Share knowledge and experiences on specific research topics of parallel sessions.	
Bilateral meetings.	one-to-one / face-to-face bilateral meetings among participants - it takes 3-4 hours a day.	

After the event		
Task	**Details /Recommendations**	**Done (√)**
Uploading presentations on website.	Beneficial for both the participants and people who did not participate the event for some reason.	
Feedback mails.	Distribute feedback forms to the participants at the end of the event. Send an e-mail to the participants to get their feedbacks after the event via web page of the event.	
Report on Brokerage Event.	Experience sharing with further organizers of the future Brokerage Events.	

5. Personal Consultation Checklists

1. Preparation and conduct of a consultancy meeting			
Tasks	**Recommendations**	**Scheduled date of completion**	**Actual date of completion**
Ask for a short description of the project idea.	*Timing suggestion*: Before the meeting		
If necessary check topic with the European Commission project officer.	*Timing suggestion*: Before the meeting		
Establish agenda points before the meeting.	• Suitability of topic chosen; • specificity of the research axes to be addressed; • eligibility criteria and other requirements for the topic chosen; • alternative topics based on the client's project idea. *Timing suggestion*: Before the meeting		
Collect and read all relevant documents.	• Information on EC policies; • EC communications; • Relevant articles. *Timing suggestion*: Before the meeting		
Summarise the objectives of the meeting.	Take into account both researcher and NCP expectations. *Timing suggestion*: At the beginning of the meeting		
Explain to the researcher	• What NCP can do and what		

the assistance she/he can expect.	she/he cannot do. *Timing suggestion*: At the beginning of the meeting		
Create conditions for a good dialogue.	• Establish time frame for meeting; • Be sure that you have a good understanding of the project. *Timing suggestion*: During the meeting		
Record in a table (or database) the advice given.	Time frame: After the meeting		
Feedback on the proposal process.	• Send the researcher any new information relevant to the project; • Keep in contact; • Ask for the final proposal. *Timing suggestion*: After the meeting		

2. Technical aspects addressed regarding a proposal			
Tasks	**Recommendations**	**Scheduled date of completion**	**Actual date of completion**
Check the suitability of the project for the topic.	• Explain the logic of the EU research within FP7; • Read the topic "word-by-word" with the researcher; • Check that the funding scheme chosen by the researcher is possible according to the topic; • Do not encourage researchers who have no chance of succeeding; • If relevant, try to identify with the researcher other themes or programmes the project could be connected to. *Timing suggestion*: During the meeting		
Give advice on the proposal writing and submission (depends on the experience of the researcher in FP Programmes).	• Explain the eligibility criteria (do not forget the eligibility criteria mentioned in the Work Programme); • Read the guide for applicants (Part A – Part B/template for writing the proposal) with the researcher; • Explain the use of EPSS; • Explain the funding schemes and the rules for participation; • Emphasise the evaluation criteria, the success rates and the challenges of proposal writing. *Timing suggestion*: During the meeting		
Keep in mind some "key questions" to be addressed by	• Why bother? (what problem is she/he trying to solve?); • Is it a European priority? (could it be solved at National level?);		

the researcher.	• Is the solution already available? (check the results of FP5 & FP6 projects on the same theme); • Why now? • Why him/her? (does she/he have the best consortium to do this work); *Timing suggestion*: During the meeting		
Explain the importance of a dissemination strategy for the European Commission.	Draw the researcher's attention to the necessity of thinking and describing a good and precise dissemination strategy. • What tools and dissemination methods will be used, e.g. reports, conferences, training courses, publications, databases etc.; • Who are the potential end users of the results: policy makers, stakeholders, researchers, SMEs, civil society etc.; • How will the results be communicated to the end users? • Will it be necessary to define a specific intellectual property policy (particularly important with the development of software or databases). *Timing suggestion*: During the meeting		
Emphasise the importance of writing the "Impact" section of the proposal.	• Define "Impact" both at political and research levels; • How will the research impact contribute to the long term political impact? • Does the proposal demonstrate its relevance to the context of major EC / EU policy documents, such as the EU2020 strategy or the Innovation Union flagship initiative? *Timing suggestion*: During the meeting		
Explain the gender aspects.	• How will the consortium promote gender equality in the project or in the field of research? • What actions will be taken to improve the gender balance in the project consortium / facilitating the participation of women in project events such as workshops, summer schools? • Consider the introduction of specific gender dimension actions for the project. *Timing suggestion:* During the meeting		
Identify ethical issues.	• Does the proposal contain ethical issues (e.g. informed consent, data protection etc.)? • If yes, find arguments to convince the ethical review panel that the project won't contravene any fundamental rights or national and international legislations. *Timing suggestion:* During the meeting		

Level 1: Checklist for a basic telephone personal consultation	
Eligibility.	Is the idea eligible within the intended call in terms of? Partner ☐ Yes ☐ No ☐ ____ Country ☐ Yes ☐ No ☐ ____ Consortium ☐ Yes ☐ No ☐ ____ Budget ☐ Yes ☐ No ☐ ____
Relevance.	Is the idea relevant to the intended call? ☐ Yes ☐ No ☐ ____
Impact.	Does the proposed impact address the basic requirements of the call? ☐ Yes ☐ No ☐ ____
Consortium (requirements of partnership).	Does the consortium meet the minimum conditions for eligibility (Annex III „Funding Schemes' & Work programme)? ☐ Yes ☐ No ☐ ____
Relevance of idea within the Framework Programme (requires an in-depth knowledge of the FP).	Does the idea fit in to the Framework Program? ☐ Yes ☐ No ☐ ____

Level 2: Checklist for an in-depth personal consultation	
NCPs should review the basic suitability of the proposal, including whether it has:	
Eligibility.	☐ Yes ☐ No Recommendation _______________________________
Clear and realistic objectives.	☐ Yes ☐ No Recommendation _______________________________
Appropriate research method to achieve the objectives.	☐ Yes ☐ No Recommendation _______________________________
European dimension.	☐ Yes ☐ No Recommendation _______________________________
Dissemination plan.	☐ Yes ☐ No Recommendation _______________________________
NCPs should review practical aspects of the proposal:	
Format, presentation, length and style.	☐ The text should be simple and legible ☐ The proposal should not exceed the maximum number of pages ☐ Budget should keep within financial limits as specified by work programme
Assistance with design.	☐ Charts ☐ Tables ☐ General flow
NCPs could also offer further assistance:	
• Help with partner search; • Invite clients to trainings; • Offer to take part in consortium meetings/internal seminars; • Offer assistance in specific legal and financial issues (contact legal and financial NCP).	

6. Checklist for a Final Proposal Check

Tasks	Recommendations	Scheduled date of completion	Actual date of completion
Set deadlines for the researchers for the proposal check process.	Calculate time to read and check the proposal and the time for the researcher to modify the proposal based recommendations.		
Specify which parts of the proposal she/he wants the NCP to check.	If no particular parts are specified, check all of the proposal.		
Check the eligibility of the proposal.	Refer to the Guide for applicants: • Verify the correct completion of Part A and B on EPSS; • Check the relevance of the proposal to the topic; • Check the relevance of the funding schemes; • Check the eligibility of the consortium; • Check the budget complies with the funding limits of the EC contribution requested; • Check the maximum page length and structure of the proposal.		

Check the evaluation criteria.	**Scientific and/or technical excellence of the proposal**
	• Soundness of concept and quality objectives;
	• Progress beyond the state of the art;
	• Verify the quality and effectiveness of the methodology and the associated work plan;
	• Verify the accuracy of the comparative perspective and the European coverage.
	
	Implementation of the proposal
	• Verify the structured of the work plan;
	• Check the appropriateness of the management structure;
	• Consortium composition;
	• Breakdown of budget and resources;
	• Provide Pert and Gantt diagrams;
	• Provide work package and deliverable lists.
	
	Impact of the proposal
	• Does it fit the impact mentioned in the work programme (Activity/Area/Topic)?
	  ○ the scientific objectives?
	  ○ the contribution to the European level?
	• Is there suitable management of intellectual property issues and appropriate dissemination strategies?
	• Are ethical issues addressed?
	• Are gender aspects considered?		

Annex 4:
NET4SOCIETY Partner Search Forms

SSH Partner Search Form

☐ I am **a COORDINATOR of a project looking for Partners**
→ **Please** complete all sections of the Form:

Call: FP7-SSH- **Topic:**

❶ Project Information

Call Identifier		**Deadline of call**	
Area		**Deadline for responses**	

Funding scheme:

Collaborative Research Project:
☐ Small or medium scale focused project
☐ Large Scale Integrating project

☐ Specific cooperation actions dedicated to focused research projects (SICA)

Coordination and Support Action (CSA):
☐ Coordination action
☐ Support action

☐ Research for the benefit of Specific Groups (BSG)

Status	☐ planned for submission	☐ running EU project

Other partners in the consortium already identified (with their countries)

Previous experience as a coordinator ☐yes ☐ no or partner ☐ yes ☐ no
If yes, in which projects?

Project Description (describe project idea briefly)

Key words :

❷ Target Partner Sought

Target Partner Organisation type :

☐ higher education / university	☐ industry/SME
☐ research institution	☐ consultancies
☐ public partner	☐ private partner
☐ NGOs / voluntary organisations	☐ other (specify)
☐ education	

Target Partner Country :	
☐ any country	☐ member state
☐ specific country	☐ third country
	☐ associated country
	☐ International cooperation partner country (ICPC) specify
Expertise required (key words) :	
Role of partner ☐ Research ☐ Dissemination ☐ Other ☐ Training ☐ Technology development	

❸ Contact Details

Contact person	☐ Ms ☐ Mr		
Organisation			
Address			
Postcode/City			
Country			
Tel.		Fax	
Email			
Web address			
Short Profile of Organisation			

Date:

I agree with the publication of my contact data on the NET4SOCIETY Website and on other national website	**yes** ☐ **no** ☐

Please fill in the partner search form and return it to the national contact point SSH.

yes ☐ **no** ☐ **NCP check completed**

SSH Project Search form

☐ I offer my **Expertise to participate as a PARTNER in a Project**
→ **Please** complete all sections of the Form:

Call: FP7- **Topic:**

Offer valid until:

❶ Project Information

Activity of the SSH work Programme concerned :

Field of expertise related to the topic:

Potential Contribution to the project :

Role in the project

☐ Research ☐ Dissemination ☐ Other
☐ Training ☐ Technology development

Project idea:

Project description:

Previous experience as a coordinator ☐yes ☐ no or partner ☐ yes ☐ no
If yes, in which projects?

Other partners in the consortium already identified (with their countries)

❷ Target Partner Sought	
Organisation details :	
☐ higher education / university	☐ industry/SME
☐ research institution	☐ consultancies
☐ public partner	☐ private partner
☐ NGOs / voluntary organisations	☐ other (specify)
☐ education	
Expertise / competency :	

❸ Contact Details			
Contact person	☐ Ms ☐ Mr		
Organisation			
Address			
Postcode/City			
Country			
Tel.		Fax	
Email			
Web address			
Short Profile of Organisation			

Date:

I agree with the publication of my contact data on the NET4SOCIETY Website and on other national website	**yes** ☐ **no** ☐

Please fill in the partner search form and return it to the national contact point SSH.

yes ☐ **no** ☐ **NCP check completed**

EUROPEAN COMMISSION
European Research Area
SEVENTH FRAMEWORK PROGRAMME
Funded under Socio-economic Sciences & Humanities

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net4society

Please refer any comments/queries about this guide to **contact@net4society.eu**

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