

# PLAN FOR COLLABORATION WITH OTHER I4MS PROJECTS AND DIHS ON THE ACTIVITIES DONE AND THE PLANS FOR THE NEXT PERIOD

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## LIST OF ABBREVIATIONS AND DEFINITIONS

|              |                                    |
|--------------|------------------------------------|
| <b>DoA</b>   | Description of Action              |
| <b>EC</b>    | European Commission                |
| <b>H2020</b> | Horizon 2020                       |
| <b>GA</b>    | Grant Agreement                    |
| <b>CA</b>    | Consortium Agreement               |
| <b>KPI</b>   | Key Performance Indicator          |
| <b>FSTP</b>  | Financial Support to Third Parties |
| <b>IA</b>    | Innovation Action                  |
| <b>CSA</b>   | Coordination and Support Action    |
| <b>IAs</b>   | Innovation Actions                 |
| <b>DIH</b>   | Digital Innovation Hub             |

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## 1 INTRODUCTION

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This document describes the engagement plan to be jointly developed by the IAs, the CSA and the DIH belonging to the I4MS ecosystem and the activities already executed. The activities presented represent the synergies identified and the action plan to carry them out. The objective is to provide information about the activities already developed, inform about the advancements of the Joint Engagement plan and offer new proposals aiming at **improving the performance and the impact of the I4MS initiative and all the projects of the third phase** (AMable, CloudiFacturing, L4MS and MIDIH and the CSA, I4MSGo).

A first deliverable was submitted in December 2017 with a description of the type of activities that could conform the Joint Engagement plan and a first tentative working plan. This deliverable is presented as an update of the first one. It contains the actions that have been developed under each activity and the next steps to keep working on the action plan. Also, the experience of having worked together for almost 12 months has allowed to adjust or concretise certain activities and the possibility to establish some indicators to evaluate the performance of our collaboration.

The document tries also to reflect the interests of the Innovation Actions in collaborating in specific topics and leave aside some others that are not considered as being a key priority for the Joint Engagement plan. Also, there is a wish for the Innovation Actions of strengthening the collaboration between them, therefore some activities will be adjusted to accommodate this need.

Even if the Joint Engagement plan for collaboration with the IAs and DIHs offers a framework of possible collaboration opportunities, the IAs and the CSA, during the monthly follow up calls, share their points of view, suggest and recommend other types of joint or supporting activities that may arise to tackle certain needs or specific questions. Thus, collaboration opportunities might also grow while projects are being implemented.

## 2 METHODOLOGY

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This section describes the methodology followed for updating the Joint Engagement Plan and the follow-up of the activities being developed. During the project's implementation the IAs and the CSA have been collaborating in some specific activities, that are now being reported in this deliverable.

The elaboration of this report has been done using the minutes of the monthly calls, the information shared on the project website about news and events, the CSA own reporting mechanisms, the I4MS community contents and the information about public events.

An initial working plan was set up for the first 3 months, the activities following the 3 first months were agreed during the monthly calls with the Innovation Actions. Other opportunities arose from the different CSA activities and events where project partners and other key players of the ecosystem (such as FIWARE, EFFRA...) are involved.

The main communication channels have been the exchange of emails, monthly calls, events with joint participation where Innovation Actions and the CSA took the opportunity to discuss future activities and being members of the ecosystem. This last point has allowed an organic collaboration, also the interaction with the European Commission and the opportunity to collaborate in organising the participation of the I4MS initiative in European events has facilitated the interaction among IAs and the CSA.

### 3 JOINT ACTIVITIES BETWEEN IAS AND THE CSA

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This section describes the activities in which the IAs and the CSA have decided to cooperate by creating collaboration links and setting up an action plan to carry them out. The activities identified will leverage on the cooperation with related ecosystems and initiatives and have been planned following the opportunities arisen at EU and partners' level.

#### 3.1 Events

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In order to make the most out of the participation in events, during each monthly call the CSA is informing about the EU upcoming events in order to plan a joint participation if possible and identify events of common interest. Moreover, the connections among all projects done via other members of the ecosystem or project partners have been the main driver of joint participation in events.

The events where one or more IAs participated together with the CSA are:

- **4 Years from Now**, 26 and 28 February 2018, in parallel of the Mobile World Capital the city of Barcelona hosts the 4YFN event is a business event where startups, investors, corporations and public institutions can discover, create and launch new ventures together. During this event the project **L4MS** together with the CSA presented the I4MS initiative and the opportunities offered by the different Innovation Actions working on robotics.
- **Global industrie Fair**, 27 and 28 March 2018, alongside the 2nd Stakeholder Forum of the Digitising European Industry initiative took place the Global Industrie Fair with the aim to bring international visibility to French industry, and to serve as a showcase for the expertise of national industry initiatives. During the event **MIDIH** together with the I4MS CSA presented their initiatives and the opportunities for SMEs.
- **European Robotics Forum**, 14 March 2018, organisation of a cascade funding workshop on Robotics. The objective of the workshop was to present the initiatives promoted by the EC to provide support to SMEs willing to incorporate Robotics solution in their business. Some of the initiatives presented were **EUROC**, **HORSE**, **Reconcell** and RobotNet, **L4MS** was involved in the co-organisation of the workshop. Each of the initiatives brought the example of a successful application experiment in order to offer a tangible vision of the type of support provided by the Innovation Actions to SMEs via Open Calls.
- **Hannover Messe 2018**, 23-27 April 2018, some of the Innovation Actions and application experiments funded under I4MS where represented at the European Commission booth. The participation of the IAs was organised by the **Fortissimo 2** project consortium together with the EC and the support of I4MSGO. During this event I4MS CSA together with CSA of SAE organised two workshops to present the opportunities to SMEs under both initiatives. From the I4MS initiative side, representatives and application experiments from **CloudiFacturing**, **BEinCCPPS**, **CloudSMEs** and **Fortissimo 2** participated as speakers during the workshop.
- **FIWARE Summit**, 8-9 May 2018, the FIWARE Foundation organised a Global Summit to exchange views and developments on how smart IoT and Open Data solutions can be implemented in the areas of Smart Cities, Industry 4.0 and Agriculture. FIWARE Foundation is the central interlocutor between the open-source developer community, industry and the users in different vertical business segments. The I4MS initiative was present in the Summit with a booth where the I4MS initiative was explained in order to promote knowledge exchange, encourage cross-border cooperation and also communicate how to access to funding for European Manufacturing SMEs through open calls associated to the initiative. Moreover, a joint panel was organised together with **BeinCCPPS** in order to showcase some



good examples of application experiments being funded under I4MS and using FIWARE technologies. L4MS project was also invited to join the FIWARE ecosystem.

During the FIWARE Summit, I4MS CSA coordinated the logistic and set up of 6 stands for 6 Application Experiments funded under BEinCPPS, being this an excellent opportunity for them to gain visibility and participating in the networking activities and panels organised during the Summit.

Future events where joint participation of IAs and the I4MS CSA is foreseen:

- **DIHs Annual event**, 27-28 November 2018. The event will bring together SMEs, start-ups, RTOs, DIHs and policy-makers from all around Europe with the objective of reinforcing the capacity of DIHs to support StartUps and SMEs in their digital transformation and it will be the occasion for all Innovation Actions under I4MS to show their contributions to the EU strategy for digitisation. Moreover, during the event the winner of the **Disruptors Awards** will be announced contributing to increase the visibility of I4MS funded application experiments.
- **ICT Proposers Days 2018**, 4-6 December 2018 a joint application for a common booth was done with some of the Innovation Actions (Fortissimo 2, CloudiFacturing, ReconCell, AMable and L4MS) and to organise a networking session\* during the event but unfortunately were not accepted.
- **Hannover Messe 2019**, 1-5 April 2019. An event to discover and showcase product innovations and the latest technology having received the support of the EU and in particular of those initiatives linked to the Digitising European Industry Strategy. The model of participation will be discussed during a monthly call organised on the 28<sup>th</sup> August 2018.

## 3.2 Communication & Dissemination activities

Communication and dissemination activities are an important part of all projects funded under H2020, the objective is to maximise the impact of all the IAs and the CSA with the available resources and means of communication. In this line, the CSA, as part of the clustering activities (activities devoted to offer support to the I4MS Innovation Actions), organised a MarCom seminar (Marketing and Communication) in March 2018 offering some tips on how to improve the communication and dissemination activities making use of the I4MS brand. The joint communication and dissemination activities are reinforced by sending press toolkit with specific information to be distributed via each social media and key messages.

### 3.2.1 Website

The IAs and the CSA will collaborate in order to populate the I4MS website with information of the ongoing activities, highlighting the information on the Open Calls, funded projects, contributing with articles about their projects, news and crosslinking all websites.

So far the following content that has been added to the I4MS website with the contributions of the Innovation Actions is:

- Events: 40 new events;
- News: 22 new pieces of information related to the IAs and I4MS activities;

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\* The networking session is in the reserve list.

- **Experiments:** 32 new experiments have been uploded to the I4MS website from the last Open Calls of Lashare and BEinCPPS. Information about the beneficiaries of the last Open Calls opened by HORSE and ReconCell will be soon available as well.
- **Information about Open Calls:** 8 different open calls have been announced through the I4MS website.
- **Catalogue and map of DIHs and CC:** 2 updates have been done to the map and catalogue of DIHs and CC having participated or being curently part of any project under I4MS.

The I4MS CSA contact the Innovation Actions when they are participating in a event to publish it in the website and offer a brief description of the activity to the ecosystem. Also during monthly calls, IAs are invited to share any content they consider of interest to be uploaded to the I4MS website.

### 3.2.2 I4MS Community

The project members of the IAs have been invited to join the I4MS community to share their own content. The I4MS shares regularly information about the Open Calls, events and information about important reports or results of EU intiatives linked to the digitisations of the European Industry as a way to attract users to the IAs marketplaces and websites.

Moreover, the I4MS CSA tries to encourage the participation of the I4MS IAs and application experiments to share their experiences and expertise with the other members in the community by doing interviews to I4MS beneficiaries and articles. IAs contribute by proposing application experiments or other stakeholders to be interviewed and showcase their solutions as inspiration for others.



FIGURE 1. Example of best practice of an application experiment shared in the i4ms community

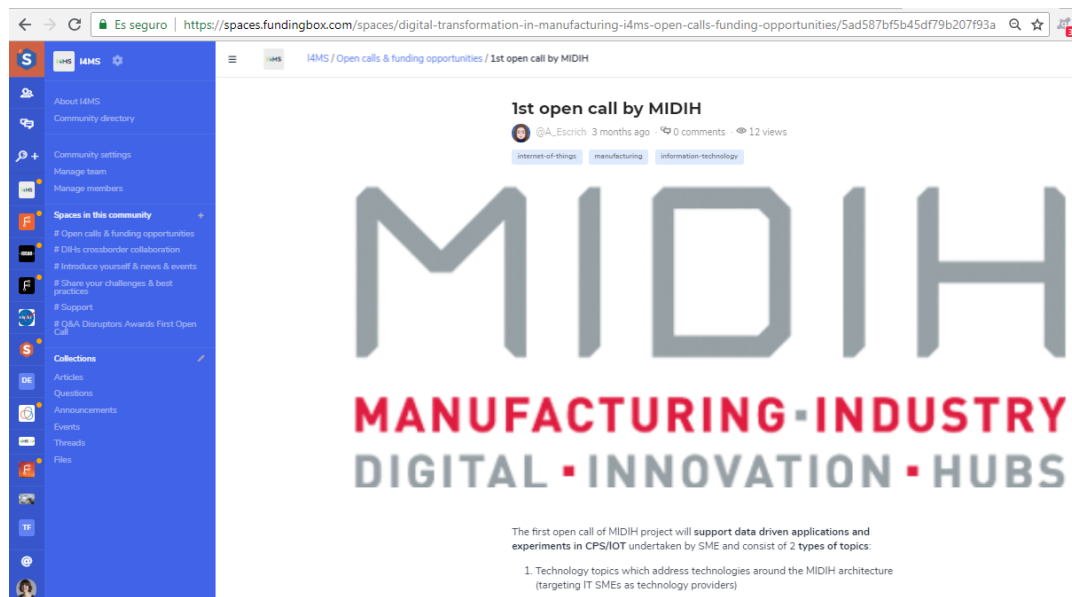


FIGURE 2. Example of information shared about the open calls

Another interesting activity organised within the I4MS community was the **Questions and Answers of the CloudiFacturing Open Call**. After the webinar the CloudiFacturing project organised with the support of the I4MS CSA a Q&A session to give interested proposers the possibility to solve last open issues in conjunction with Open Call requirements.

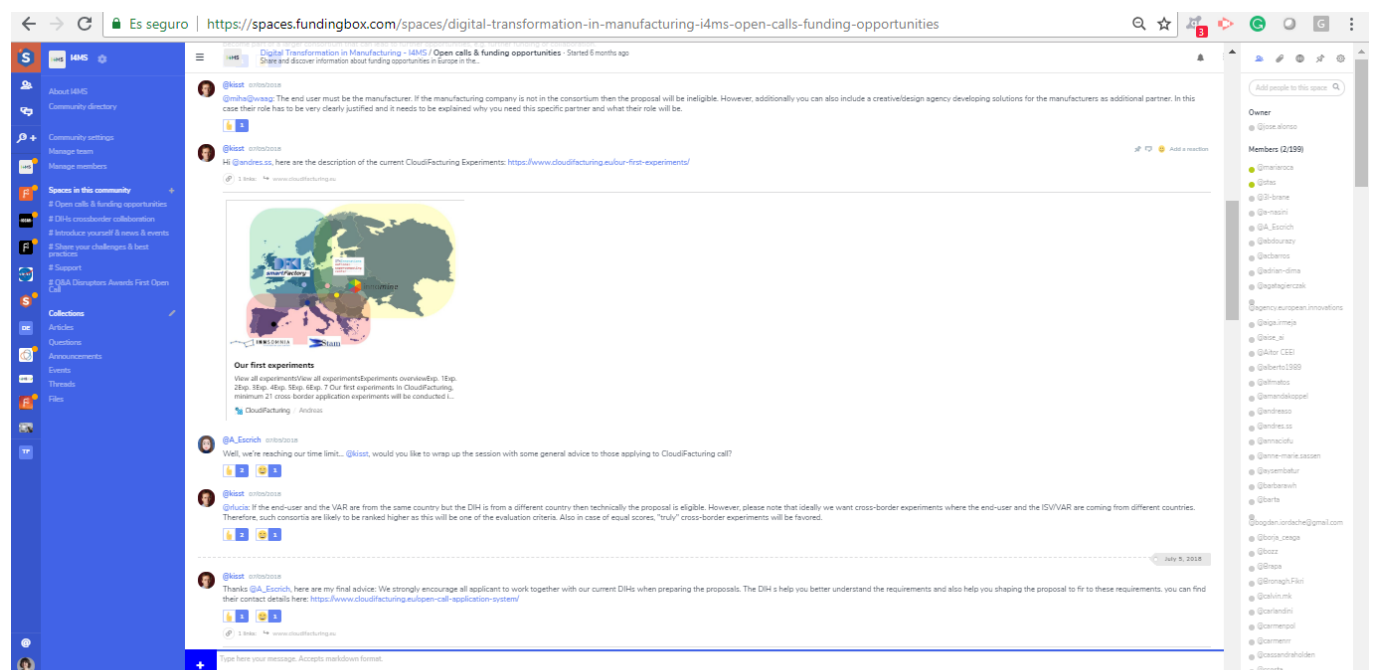


Figure 3. Screenshot of the Q&A session about the CloudiFacturing Open Call organised within the I4MS community

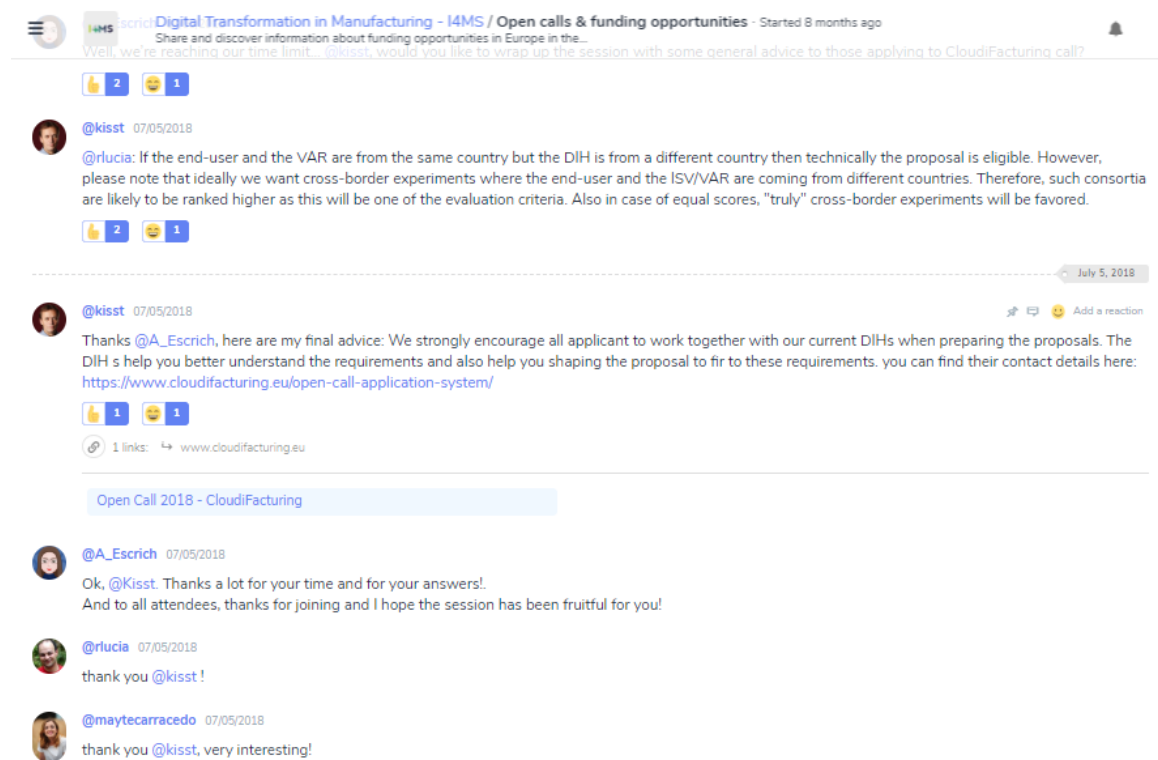


FIGURE 4. Screenshot of the Q&A session about the CloudiFacturing Open Call organised within the I4MS community

In the last monthly call with the IAs some of the IAs, brought to the CSA attention the difficulties that IT providers might face in finding end users in other countries. In order to overcome this barrier it was agreed to create a space within the I4MS community to help potential beneficiaries to look for cross-border partners in order to participate to the I4MS Open Calls, **a partners' search space**.

Another mission as CSA is to communicate and disseminate project results, in that sense is of interest the opportunity that the community brings in terms of interacting with potential users of the marketplaces developed during the course of the project. With the aim of further supporting IAs in the dissemination of their results, future activities such as interviews to marketplace owners, Q&A sessions with potential users of this platform will be organised.

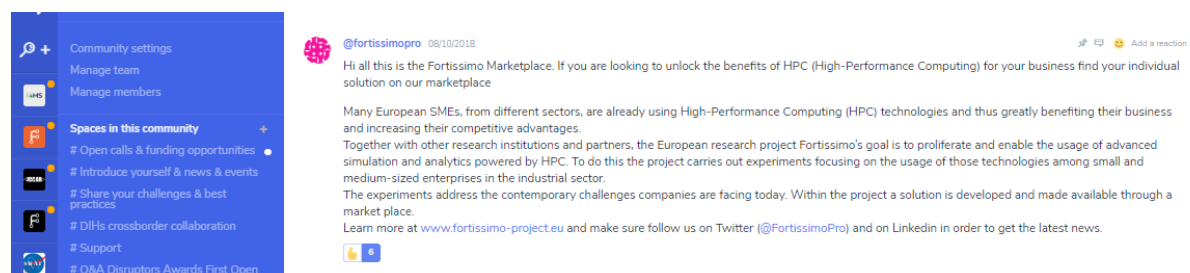


FIGURE 5. Screenshot of a post about the marketplace developed by Fortissimo 2

### 3.2.3 Social networks

The CSA supports IAs in providing tips on how to increase their impact in social networks to foster cross-tweets, likes, mentions between IAs and take advantage of the potential of social networks in reaching wider audiences. In March 2018 the CSA organised the **MarCom seminar** where IAs received information about how to use the I4MS brand and increase visibility.

The joint communication and dissemination activities are reinforced by **sending press toolkits** with ready to share posts to be distributed via each social media and key messages and also about typical **cross-dissemination activities**.

The main goals for the I4MS Twitter account are to create brand awareness and spread the word about I4MS initiative and its related activities. In that sense, initiative has reached a total number of **186,450 impressions, 2,227 profile visits** and **234 mentions** over the last 6 months (from the 31<sup>st</sup> of January to the 31<sup>st</sup> of July)



FIGURE 6. Screenshot of twitter communications

The tweets published per initiative are as follow:

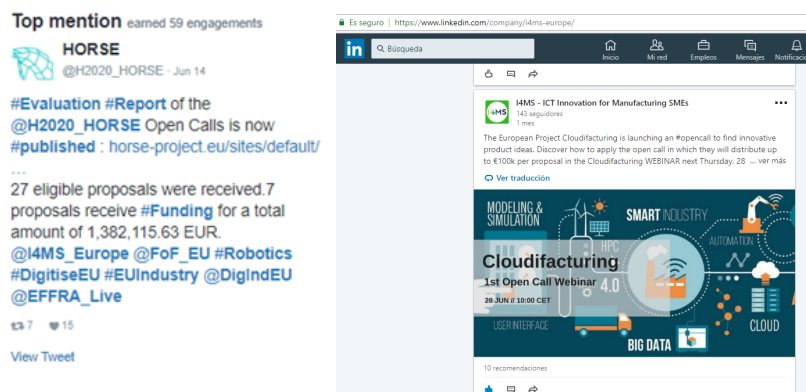
- |                       |                |
|-----------------------|----------------|
| • CloudiFacturing: 18 | • MIDIH: 5     |
| • AMable: 13          | • CloudSME:1   |
| • L4MS: 2             | • Cloudflow:1  |
| • EuRoC project: 5    | • Fortissimo:4 |
| • LASHARE: 4          | • Reconcell: 1 |
| • HORSE:2             |                |

The I4MS LinkedIn account has one main objective: divulge the I4MS initiative to a broader audience. To reach that goal, is necessary to reinforce the I4MS brand by echoing marketing content already created. With that goal in mind, a strategy has been created to communicate the main achievements of I4MS Go project and also interesting information for our audience like Open Calls, participation in Trade Shows and events, and Awards.

The total number of impressions during the first 6 months (February to July) has been **13,556** with a global CTR (Click-through rate, the ratio of users who click on a specific link to the number of total users who view a page) of **2.66%** and global engagement rate of **4.24%**.

The posts shared per Innovation Actions has been the following:

- CloudiFacturing: 3
- AMable: 3
- MIDIH: 1
- Reconcell: 3
- Fortissimo: 1



**FIGURE 7.** Examples of communications done via social networks (left Twitter, right linkedin)

### 3.2.4 Public dissemination materials

I4MS newsletters, leaflets and brochures have been elaborated with the support of the IAs by identifying best practices, sharing information on open calls, services provided and any other type of information that might be relevant for this type of materials<sup>2</sup>.

So far two newsletters have been released plus two one-pagers, one with key information of the I4MS initiative and another one with information to engage third parties in the communication and dissemination of Open Calls. A third one-pager will be elaborated for the Annual Event of DIHs.

<sup>2</sup> Detailed information about the procedures to elaborate communication and dissemination materials together with IAs included in the D3.10 of the I4MS CSA.



FIGURE 8. Newsletter template and first newsletter



FIGURE 9. One page of the i4ms initiative as a whole



Figure 10. One pager to attract third parties in the dissemination of the Open Calls and SMEs engagement.

The I4MS CSA has also invited the Innovation Actions and their Application Experiments to apply to different **calls to select best practices or success stories** promoted by the EC. This type of activities are being translated into great opportunity to gain visibility at European level and obtain the recognition of the European Commission.

- Information shared about the campaign called [InvestEU](#) : a big corporate initiative to promote successful EU-funded projects and how they impact society/economy. The projects



are promoted through videos, web stories, brochures, factsheet, etc. produced by a specialist team from the Commission.

This year the selected success story was from iManHubNorte.

- Participation in the selection of success stories involving DIHs and Application Experiments funded under I4MS.

### 3.3 Open Calls

One of the main objectives of the CSA is to support IAs in the Open Calls dissemination and communication. IAs share regularly information about the Open Calls requirements, deadlines, services availability and eligibility conditions. In this framework below there is a description of all activities that have been jointly carried out related to the Open Calls:

- I4MS CSA created a **template to elaborate the Guidelines for Applicants** with links and information about the EC procedures and requirements to launch open calls and to facilitate the streamline of call related documents.

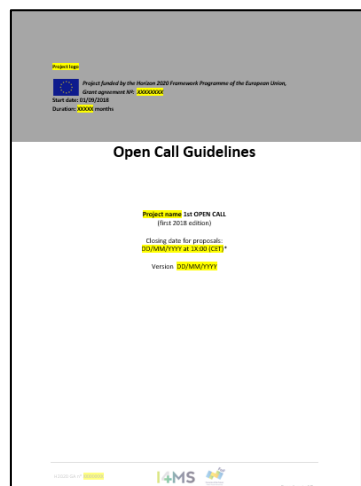


Figure 11. Front page of the template of the Guidelines for Applicants sent to the IAs

- Organisation of **webinars**, that means that the CSA creates a microsite for the event and a registration page. I4MS CSA also sends detailed information about the webinar before it takes place and set-ups the meeting in the GoToMeeting tool that puts at the IAs disposal.
  - 29 February 2018 Inhacer webinar (ReconCell solution);
  - 09 March 2018 ReconCell webinar;
  - 28 June 2018 CloudiFacturing webinar.



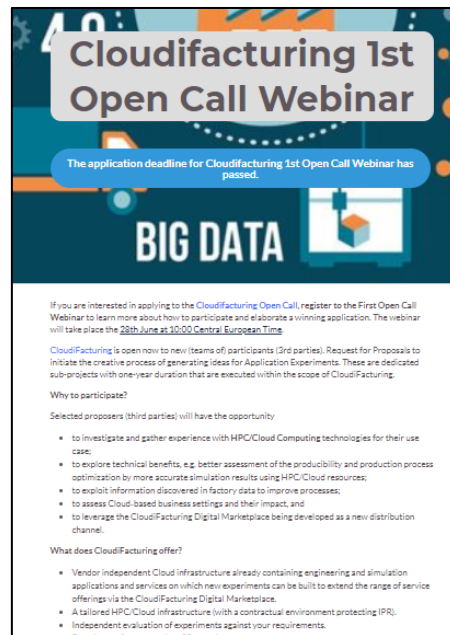


Figure 12. Screenshot of the microsite created to announce CloudiFacturing webinar

- Elaboration of **targeted press releases** for each open call. The I4MS CSA elaborated a first press release that is shared with the Innovation Actions for its approval and is sent to a professional agency in charge of sending out the press releases to the relevant media in Europe. Those press-releases are also offered to the communication departments of the projects to use it as an own resource. The detailed press releases are included below:
  - **MIDIH Open Call:** distribution reach of almost 9,000,000 impacts in more than 7 countries (Spain, Germany, Italy, France, Belgium, Switzerland, Netherlands, etc.), valued at 94,849€
  - **CloudiFacturing Open Call:** distribution reach of 7,225,432 impacts\*\* in more than 7 countries (Spain, Germany, Italy, France, Belgium, Switzerland, Netherlands, etc.), valued at 75,087€
  - **AMable Open Call:** distribution reach of 7,811,613 impacts in more than 7 countries (Spain, Germany, Italy, France, Belgium, Switzerland, Netherlands, etc.), valued at 74,806€
- **Session on How to disseminate an open call successfully**, tips from Roi Rodriguez Project Manager of Impact Growth and Robot Union. During one of the Monthly Open Calls, Roi Rodriguez, project manager at FundingBox and with an important track record managing open calls, offered some tips and actions necessary to successfully disseminate Open Calls.

\*\* Number of potential recipients of the information published.



**Figure 13.** Screenshot of the presentation done by Roi Rodríguez about how to disseminate an open call successfully

- **Creation of a common database of evaluators**, due to the need of the IAs to recruit experts to evaluate the applications submitted to the Open Call, it was agreed that the creation of a joint database of evaluators uniting different profiles, from technical point of view and also business, could facilitate the evaluation process and hiring of experts. I4MSGO will take care of that activity setting up an open call for evaluators.
- **Learning from the experience of IAs of phase II**, during future calls with the IAs, IAs of phase II will offer their vision about how to attract end-users to participate in the Open Calls, based for instance on the experience of the project HORSE and its website section open to share collaboration opportunities.

### 3.4 Access to platforms and infrastructure

I4MS CSA created a specific space for discussion and document sharing due to the impossibility for some institutions participating in the IAs to use platforms such as Dropbox or Google Drive.

The IAs have plans to create their marketplaces in order to promote the results of the application experiments and incentivise the use of the developed technologies by third parties. Experts or initiatives having undertaken similar actions will be invited to provide their insights and know-how during monthly calls. Also, the experience of phase II IAs such as Fortissimo 2, CloudSMEs can be highly valuable for the running IAs.

The I4MS CSA will take specific dissemination and communication activities devoted to encourage the use of the IAs marketplaces and creation of deal-flow.

Moreover, the **I4MS CSA** has created a [Regional Advisory Board](#) to discuss how regions could take advantage of the learnings, results of application experiments and Innovation Actions expertise. The main objective is to contact Regions and offer them information about the role of I4MS, developed solutions and how using similar schemes such as FSTP and I4MS they can fund digital transformation experiments in their own regions.

In this framework L4MS and I4MA CSA are working on a first use case of connection between an I4MS IA and a non-beneficiary region (La Rioja, Spain) through an agreement to become Regional

Satellite node<sup>3</sup>. Our intention now is to connect with other regions in Europe that can join the project through this role and therefore have access to the tech solutions and the knowledge developed by the IAs. The region will launch an open call for funding experiments at local level with this solution, and some local DIH will support the companies at local level using the technology of the IA. As a result, this region, with very few RTOs will not need to develop that technology and will benefit by using the solutions developed at L4MS. This activity has been presented to the IAs, the I4MS CSA has offered this possibility to the other IAs doing the contact and connections with regions.

### 3.5 Maturity assessment and technological support

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The CSA has informed more than 250 SMEs and Mid-caps contacted via the I4MS community or present in events such as Mobile World Congress, FIWARE Summit, Global Industrie Forum and other local events targeting potential beneficiaries of the Open Calls of the opportunities related to the application of experiments and the type of services offered by DIH and the IAs.

Moreover, IAs have undertaken also their own communication and dissemination activities in order to promote the technological support offered by their projects.

In the future and in order to achieve the result of this activity: offer examples and recommendations on how to establish cross-border collaborations in delivering joint digitisation strategies and implementing them, different experiences will be shared with the IAs during the monthly calls to open the discussion. IAs will also be invited to propose ideas about the possibilities and opportunities of delivering this type of services together.

### 3.6 Brokerage and matchmaking

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Based on the CSA and IAs experience having identified brokerage and matchmaking activities as the key to success in attracting SMEs, specific activities will be designed in joint events such as the annual event of DIHs, IoT Summit, Mobile World Congress 2019 and Hannover Messe 2019 among other opportunities that may arise in the future.

So far, the I4MS CSA has participated in 33 local events and offering to a group of 50 manufacturing SMEs present in the MWC 2018 a presentation about the I4MS initiative and the opportunities offered by the Innovation Actions.

Also, the alliance with and contact with intermediary bodies such as chambers of commerce, industrial associations and similar entities is contributing in attracting traffic and redirecting it to IAs. These contacts have been mainly done participating in events and also through the EEN nodes located in each region. A session to discuss about the participation in events has been programmed for the 5<sup>th</sup> monthly call that will take place at the end of August (28<sup>th</sup>).

Another activity to foster the communications between the industry and research institutions has been the Matchmaking service being built upon the I4MS community platform. The platform provides a solution that allows outbound and monitoring all the communications of the ecosystem from one place. This is a powerful communication and analytics tool for building and organizing communications at scale, and learning how people interact on top of it, several features has been developed to empower the dynamism of the community and among them the matchmaking

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<sup>3</sup> Regional Satellite nodes: Regions can take profit from the solutions developed (platforms, marketplaces) in L4MS and also the possibility for them to fund experiments or hire project experts to offer technical expertise in elaborating regional funds and supporting structures for the digital transformation of SMEs.

capabilities play a crucial role to make a more engaging community to retain users, create synergies and foster business and research relationships.

### 3.7 Access to finance

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Based on the activities described in the Plan for collaboration with other I4MS projects the objective of this activity is to share information on national, regional and other funding sources to offering SMEs and mid-caps a wider range of funding opportunities. The importance of communicating the availability of funds for SMEs can facilitate the uptake of digital enabling technologies and contributing to the sustainability of the actions under the I4MS initiative. In this direction the following information has been shared so far:

- Invitation of 2-3 experiments to **Industrial Data Space Association Summit** to a Pitch Session on **22 March 2018, between 13:00-15:00**. The participation in the event could represent a good opportunity to gain visibility, learn more about IDS and get in contact with experts and look for collaboration opportunities. On top of that, Experiments could have the occasion to be shown continuously on a screen in the exhibition area so that attendees can ask questions and network with the teams. None of the application experiments funded under I4MS was able to participate.
- Invitation to HPC application experiments to participate on the **28 March 2018** to a webinar organised to get information about the **BOSCH venture opportunities** and type of collaboration this big corporate is looking for with other companies.

Moreover, during the second year of the third phase of the I4MS initiative the CSA will open the **Acceleration programme and go-to market roadmap** targeting the best-in class experiments. The IAs together with the CSA will contribute to the identification the best experiments to benefit from those two opportunities to get further funds, access to market tips and opportunities to collaborate with corporates. In this regard the activities planned so far are:

- **First I4MS acceleration programme BootCamp first batch** to be delivered during the **DIHs annual event 28<sup>th</sup> November 2018**. Open to 45 participants.
- **I4MS Acceleration programme webinars** to be offered to the best-in class experiments.
- **Second batch of the I4MS acceleration programme BootCamp** to be delivered in 2019, event to be decided.

In order to identify synergies and look for complementarities between the programmes offered by the IAs, a discussion on this topic will be programmed at the end of 2018 in order to evaluate possible collaborations among projects.

### 3.8 Self-sustainability plan

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Following the description of this activity in the collaboration plan, during the 5<sup>th</sup> monthly call with the IAs at the end of August the I4MS CSA will present the activities being carried out via the Regional Advisory Board to explore the possibilities to get additional funds to finance experiments.

The objective of this presentation will be to share with the IAs if there are common plans to contact national and regional authorities in their networks to promote the use of other funding sources such as ESIF, national or regional to finance experiments and use the know-how generated by the I4MS initiative, as well as the access to the marketplaces created by the participating projects. After having

identified complementarities a joint action plan to contact with regional authorities can be elaborated.

### 3.9 Skills creation

This activity was initiated during the 3<sup>rd</sup> monthly call in April 2018, where the CSA presented the activity to create a joint catalogue of training and Skills to improve the uptake of digital technologies by SMEs and mid-caps.

This activity will focus on researching all of the training initiatives, in terms of methods and courses, that have been produced by the Innovation Actions supported by the I4MS projects phase 1, phase 2 and phase 3, complementing it with other training initiatives that are being developed by DIH through European funding. The collaboration of the IAs is expected to identify the trainings and establish other synergies if necessary.

The creation of a catalogue has a purpose of its own within the I4MSGo project logic<sup>4</sup>, therefore also needs to be aligned with the value that related IAs aim to create. Between April and June, the focus was set on creating a shared vision between the I4MS CSA and its supported IAs on how the training catalogue should be created as well as on developing a methodology that will lead to a homogenous and consistent result.

This process consisted of presenting the activity during the 3<sup>rd</sup> monthly call with the Innovation Actions, designing and sending a survey (see Annex 1) to all Innovation Actions, processing their answers, holding one-to-one interviews with the respondents, and using the obtained information to set-up the scope and create a feasible methodology.

The framework is developed such that it supports the technology absorption life cycle.

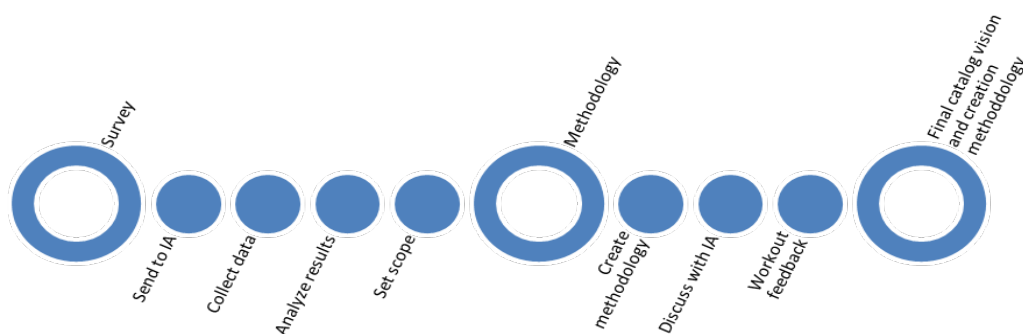


Figure 14. Steps followed for setting up scope and methodology

### 3.10 Measuring performance and impact

The CSA together with the IAs will identify a set of performance indicators to evaluate the impact and significance of the joint engagement plan. I4MS has elaborated a first proposal of common indicators

<sup>4</sup> The whole methodology and objectives of the catalogue of trainings is described in detail in the D3.7. I4MS Skills Label of the I4MSGo project.

associated to the performance of I4MS initiative in regards to the activities included in this Joint collaboration plan.

List of proposed indicators:

| INDICATORS  | TARGET   | ACTIVITIES TO REACH THE TARGET   |
|---|--|--|
| <b>Nº of events with the participation of the IAs and CSA</b>                                   | 18 events  | <ul style="list-style-type: none"> <li>- Look for opportunities of joint participation in events organised by the EC;</li> <li>- Organise joint workshop during international events.</li> </ul>   |
| <b>Nº of potential beneficiaries reached through communication and dissemination activities</b> | 1 Million  | <ul style="list-style-type: none"> <li>- Events with joint participation;</li> <li>- Events targeting SMEs;</li> <li>- Press Releases about Open Calls;</li> <li>- Impacts in social media.</li> <li>- SMEs members of the I4MS community</li> </ul> |
| <b>Nº of SMEs asking for information about the funding opportunities offered by IAs</b>         | At least x3 times the number of AEs supported by the IAs | <ul style="list-style-type: none"> <li>- Queries received by SMEs (online and offline);</li> <li>- Participants in webinars;</li> <li>- Participants in Q&amp;A sessions.</li> </ul>   |
| <b>Nº of applicants in Open Calls</b>   | At least x2 times the number of AEs supported by the IAs | <ul style="list-style-type: none"> <li>- Number of submitted application forms.</li> </ul>   |
| <b>Nº of matchmaking activities organised during joint events</b>                               | At least 5   | <ul style="list-style-type: none"> <li>- Parallel activities during joint events to match end-users with IAs technological support offer.</li> </ul>   |
| <b>Nº of joint activities to leverage additional funds (public or private)</b>                  | At least 4   | <ul style="list-style-type: none"> <li>- Share information about the existence of private or public funding opportunities.</li> <li>- Organisation of informative sessions, brochures, articles or webinars.</li> </ul>                              |
| <b>Nº of joint activities related to the role of Region in digital transformation</b>           | At least 4   | <ul style="list-style-type: none"> <li>- Informative sessions with Regions.</li> <li>- Incentivise the use of ESIF funds to replicate I4MS model.</li> <li>- Raise awareness events targeting regional authorities.</li> </ul>                       |
| <b>Nº of joint activities related to skills creation</b>  | At least 2   | <ul style="list-style-type: none"> <li>- Elaboration of a joint catalogue of trainings.</li> <li>- Events related to skills in digital transformation.</li> </ul>  |

TABLE 1 First proposal of indicators to measure the collaboration among IAs and I4MS CSA



Table 1 shows a first proposal of the indicators that could be used to measure the collaboration among the IAs and the I4MS CSA. The indicators have been identified taking into account the activities and the type of collaborations included in the collaboration plan. The target or the objectives to be reached have been set considering the difficulties in performing the activities, but with putting the necessary efforts that result in the improvement of the interactions of the I4MS IAs and the CSA.

The activities listed in the right column will be monitored to gather the information and the data to check if the target is achieved. To this end the CSA will create an excel sheet allowing the collation of information per indicator. The information will be collated by the CSA and included in the spreadsheet using its own reporting resources, especially those linked to the Communication and dissemination activities.

Innovation Actions will be asked every 6 months or after the Open Calls only the information that is not publicly available. The CSA will do an effort to coordinate the information requests to minimize efforts and to avoid overlaps with the European Commission and EFFRA requests.

Those indicators will be presented during the 6<sup>th</sup> monthly call in order to agree on the methodology and the activities proposed to reach the objectives.

Moreover, IAs will share some of their indicators associated to the Open Calls in order to communicate the results and impact of the I4MS initiative and show its strong commitment towards the Digitisation of European Industry in public communication materials. All indicators will be shared with the IA so they can use them in public presentations to show the advancements of the joint engagement plan and be able to make a follow-up.

## **4 JOINT ACTIVITIES BETWEEN IAS, THE CSA AND THE DIH NOT LINKED TO THE IAS**

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The Digital Innovation Hubs (DIH) are a pillar of the Digitising European Industry Strategy and play a key role in facilitating access to digital competence at regional level. Fostering digital transformation of the European industry will significantly contribute to boost competitiveness and facilitate the access to key enabling ICT technologies by SMEs and mid-caps.

The European Commission wants to ensure that every region in Europe has at least one DIH by 2020, making digital innovation accessible at a working distance to any company. However, the deployment of DIH has been unequal in Western and Eastern countries. In order to balance this situation, 30 potential DIHs from the EU13 targeted countries were selected to participate in a training programme managed by the European Commission on behalf of the European Parliament. Joint activities could also contribute to reduce these differences by creating 1:1 connections and peer-learning opportunities.

This section tries to identify and plan the activities that can be promoted to create synergies among the ongoing IAs, the CSA and the DIH represent collaboration opportunities in two directions, from the IAs and the CSA, to the DIH and vice versa.

It is worth mentioning that IAs are also making an effort in contacting DIHs outside the I4MS ecosystem, for instance, CloudiFacturing has built up a contact to the Greece DIH LMS to evaluate if the project has some potential interface to the activities in the project SERENA led by LMS. Both project coordinators had a first exchange of information in a WebEx meeting to see if there is a

mutual interest to collaborate in the future. The fruitful discussion will be continued after more of the experiment results are available

## 4.1 Events

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The participation in events targeting DIH or other of potential interest will be identified in order to establish contact with the DIH participating in these events and organise side-events or face to face meetings. Apart of the peer connections between DIH, the CSA will take the lead on looking for opportunities to meet other DIH to share experiences with IAs, share best practices and know-how, explore possibilities of collaboration organising technologies related events, disseminate the IAs Open calls across the network of DIH. The participation of the IAs and CSA in world-class events will be announced via social networks and the I4MS Community to facilitate interactions.

Events where joint participation of DIHs and members of the I4MS initiate was possible:

- [First Working Group meeting of Digital Innovation Hubs in Europe](#), 22<sup>nd</sup> January 2018.
- [Second Working Group meeting of Digital Innovation Hubs](#) focused on improving access to finance for SMEs and DIHs, 21<sup>st</sup> of February 2018.
- [Third meeting of the Working Group on Digital Innovation Hubs](#) focussed on networking among Digital Innovation Hubs, the role of Member States and regions, and the catalogue of Digital Innovation Hubs, 25<sup>th</sup> May 2018.
- [Fourth meeting of the Working Group on Digital Innovation Hubs](#) to discuss about the role Digital Innovation Hubs are playing to develop the digital skills that SMEs need for their digital transformation, 2<sup>nd</sup> July 2018.
- [Hannover Messe 2018](#), 23-27 April 2018, some of the Innovation Actions, application experiments and DIHs funded under I4MS where represented at the European Commission booth.





**Figure 15.** Picture of the visit of Commissioner Oettinger and Max Lemke to the European Commission booth at Hannover Messe

Future event where joint participation of IAs, the I4MS CSA and DIHs is foreseen:

- **European Week of Regions and cities: [workshop on co-design DIHs in new member States](#).** 11th October 2018, Brussels. In the context of "Smart Factories in New EU Member States" project, 34 potential Digital Innovation Hubs (DIHs) from the EU13 Member States receive training on how to develop a sustainable DIH in their region. The session will utilise highly participatory approach based on design thinking and co-creation methodologies to identify and validate recommendations for policymakers at the regional, national and EU level on how to set up DIHs in less digitised regions.
- **DIHs Annual event**, 27-28 November 2018. The event will bring together SMEs, start-ups, RTOs, DIHs and policy-makers from all around Europe with the objective of reinforcing the capacity of DIHs to support StartUps and SMEs in their digital transformation and it will be the occasion for all Innovation Actions under I4MS to show their contributions to the EU strategy for digitisation.
- **[BARCELONA INDUSTRY WEEK](#)**, 16-18 October 2018 in Barcelona. **Digital innovation hubs. A challenging European initiative. How to make things happen Will be jointly organised with I4MS.** The goal of this session is to strengthen the concept in Southern Europe and promote the generation of networking between different groups.
- **[Hannover Messe 2019](#)**, 1-5 April 2019. An event to discover and showcase product innovations and the latest technology having received the support of the EU and in particular of those initiatives linked to the Digitising European Industry Strategy.
- Future **Working Groups of DIHs** organised by the EC.

In the framework of the Working Group of DIHs the I4MS CSA has offered to the EC the possibility to organise a **workshop focused on regions** and their role in evangelising, funding and being part of DIHs. Since this connects with one the activities that has been recently launched in I4MSGO and proposed for collaboration with the IAs.

- FIWARE Summit among others.

## 4.2 Communication and Dissemination activities

DIHs have been invited to join the I4MS community to cross-link, cross-post, promote articles published in the IAs and DIH website, blogs of other sources of information. Moreover, the most active DIH will be invited to share their experiences and success stories in the community as a way to inspire the work and provide know-how about the work of DIH. **The space devoted to DIHs within the I4MS community has a total of 203 members.**

Moreover, the most active DIH will be invited to share their experiences and success stories in the community as a way to inspire the work and provide know-how about the work of DIH.

### HUB4MANUVAL, the Valencian DIH that improves the competitiveness of regional SMEs

Based in the Polytechnic University of Valencia, it has been funded by I4MS initiative through HORSE project



**Figure 16.** Example of how to gain visibility and promote the activities of the DIHs

The [catalogue of DIH](#) included in the I4MS website, gathers the information of the DIHs created with the support or under the sponsorship of I4MS. With the aim of giving visibility to the DIH working within the I4MS technologies, the I4MS website includes a list of the DIH funded under the I4MS initiative under its phase 2 and the DIH and CC participating or having taken part of the I4MS past projects.

Moreover, the CSA plan to deliver a webinar on how to use the I4MS online community as a tool to communicate with the DIHs ecosystem and offer an example about the role of online communizes in the delivery of DIHs services.

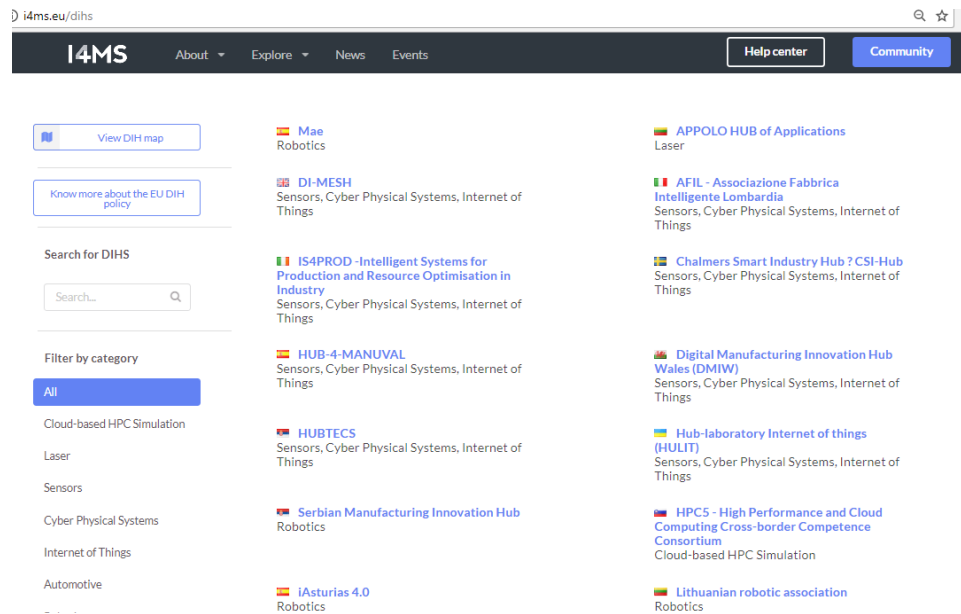


FIGURE 17. Screenshot of the list of CC and DIH included in the I4MS website

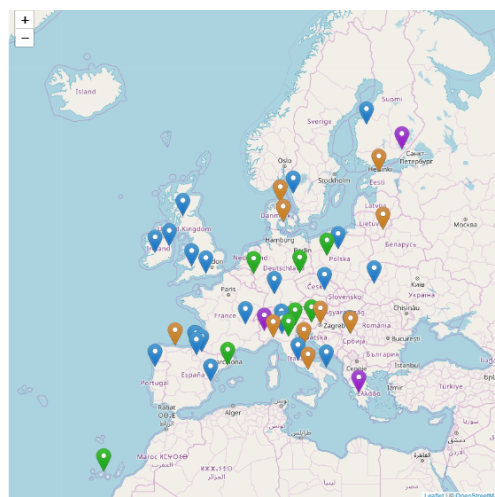


FIGURE 18. Screenshot of the map of CC and DIH by technology areas

### 4.3 Open Calls

The information related to the IAs Open Calls is distributed in a common basis among the DIH network to attract SMEs and invite DIH to participate in those calls targeting DIH such as CloudiFacturing. The result of this activity will be the generation of an information flow related to the funding opportunities available managed by the different IAs and DIHs.

Below a list of the events targeting DIHs where the information of the I4MS Open Calls was presented:

- [First Working Group meeting of Digital Innovation Hubs in Europe](#) 22<sup>nd</sup> January 2018.
- The **Polish platform of industry 4.0** hosted a meeting with DIHs in Poland to talk about funding opportunities and European Projects. The I4MS Initiative and the open calls within the initiative available for SMEs in Poland were presented.

- [Smart Factories in new EU Member States](#) 15<sup>th</sup> May 2018. Presentation during a training session on the challenges in adopting digital technologies and explained EU initiatives to facilitate digital transformation to SMEs. This project offers special training for the 30 organisations identified as a potential DIH and based in EU13 countries.
- [Third meeting of the Working Group on Digital Innovation Hubs](#) 25<sup>th</sup> May 2018.
- [Fourth meeting of the Working Group on Digital Innovation Hubs](#) 2<sup>nd</sup> July 2018.

#### 4.4 Access to platforms and infrastructure

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IAs will invite DIHs based on different access levels, models and cooperation activities to use their marketplaces. The I4MS CSA will invite IAs and DIH to exchange their point of view about how to deliver this type of services and benefit from other platforms.

In this framework I4MS have agreements with several DIHs that will act as Satellite Nodes<sup>5</sup>. This model could be extended to other DIHs and replicated by the I4MS Innovation Actions. Being a Satellite Node gives DIHs access to the tech solutions and the knowledge developed by the IAs.

I4MS CSA invites all IAs to take part of this activity offering their expertise, marketplaces or developments to the Regions contacted and look for synergies in this direction.

#### 4.5 Maturity assessment and technological support

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With the aim of exploring further the potentialities for offering a joint maturity assessment and technological support together with other DIHs outside the IAs, the CSA will open a discussion in the I4MS community inviting DIH and IAs to share examples of possible collaborations and give the opportunity to create specific discussion groups on enabling technologies to develop joint digitisation strategies. As explained in the section related to the collaboration across the IAs this subject is becoming more important as the EC is promoting the use of different resources from different DIHs in order to offer extensive services to SMEs.

The results of the Innovation Actions Open Calls could contribute to shed light in ways to organise this type of collaborations based in the examples of the funded application experiments, where, in some cases, DIHs can be also beneficiaries or are responsible for delivering part of the services together with Project partners.

#### 4.6 Brokerage and matchmaking

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The strategy to be followed to achieve a good result in this activity should be the participation in joint events and inform and train DIHs of the I4MS initiative and opportunities in order to attract more end-users and increase the number of SMEs undergoing a digitisation process.

Events should also serve as an inspiration to end-users and should offer the opportunity to interact by organising speed-dating activities or 1:1 meetings.

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<sup>5</sup> Satellite nodes: Organisations, DIHs, Competence Centres can take profit from the solutions developed (platforms, marketplaces) in I4MS and also the possibility for them to fund experiments or hire project experts to offer technical expertise in elaborating regional funds and supporting structures for the digital transformation of SMEs.

Is worth mentioning the **DIHs Annual event**, 27-28 November 2018. The event will bring together SMEs, start-ups, RTOs, DIHs and policy-makers from all around Europe with the objective of reinforcing the capacity of DIHs digital transformation of SMEs. During the event DIHs will have the occasion to learn more about the Digital Europe Programme and their role in its implementation among other key measures supporting DIHs at European Level.

DIHs will also be invited to take part in **matchmaking opportunities** (speed dating, round tables...) between DIHs and SMEs. Specific discussions will be organised during the event around topics of interest to work in future European projects such as the SAE call DT-ICT-01-2019 and around enabling technologies. At the same time, SMEs and DIHs will also have the opportunity to present their organisations, activities during the event as members of some of the panels or in a pitching corner.

#### 4.7 Access to finance and self-sustainability plan

The plans of IAs to provide access to finance to DIH range from Open Calls targeting DIHs to matching experiments to private and public funding sources. This activity is directly linked to the one that has been planned with the IAs, therefore some content might be shared with the DIHs in order to provide examples and information about the additional funding opportunities that could be used to facilitate digital transformation of SMEs in the different EU countries.

#### 4.8 Skills creation

This activity will be focused on collating the information on training activities offered by the DIH to be added to the joint catalogue of trainings that will be elaborated together with the collaboration of the IAs. Information will be collated in first wave during the last quarter of 2018 and mid-2019.

The activity lead by the I4MS CSA to create a catalogue of training was presented during the 4<sup>th</sup> Working Group of DIHs. During the event DIHs were invited to take part in the activity by including their training offer in the catalogue.

#### 4.9 Measuring performance and impact

The CSA together with the IAs will identify potential indicators to follow-up the growth and performance of the collaboration activities between I4MS and the DIHs.

The activities listed in the right column will be monitored to gather the information and the data to evaluate if the target is achieved. To this end the CSA will create an excel sheet allowing the collation of information per indicator.

| INDICATORS   | TARGET                          | ACTIVITIES TO REACH THE TARGET   |
|--|---------------------------------|--|
| Nº of events with the participation of the IAs, CSA and DIHs | 4 events                        | <ul style="list-style-type: none"> <li>- Look for opportunities of joint participation in events organised by the EC;</li> <li>- Organise joint workshop during international events.</li> </ul> |
| Nº of DIHs asking for information about                      | At least x2 times the number of | <ul style="list-style-type: none"> <li>- Queries received by SMEs (online and offline);</li> </ul>   |

|  |                          |   |
|--|--------------------------|---|
| <b>the funding opportunities offered by IAs</b>                    | AEs supported by the IAs | <ul style="list-style-type: none"> <li>- Participants in webinars;</li> <li>- Participants in Q&amp;A sessions.</li> <li>- Members in the DIHs space within I4Ms community.</li> </ul>  |
| <b>Nº of DIHs taking active participation in the I4MS platform</b> | At least 100             | <ul style="list-style-type: none"> <li>- DIHs being interviewed or sharing content in the I4MS platform.</li> <li>- DIHs disseminating information about I4MS activities.</li> <li>- DIHs sharing information in the I4Ms catalogue of DIHs.</li> </ul> |
| <b>Nº of joint activities related to skills creation</b>           | At least 1               | <ul style="list-style-type: none"> <li>- Collaboration in the joint catalogue of trainings.</li> </ul>  |

TABLE 2 Indicators to measure the collaboration among IAs, I4MS CSA and DIHs

## 5 INTERNAL COMMUNICATION

The internal communication tools to be used will continue being emails exchange, the spaces that the CSA will put at the IAs' disposal to foster collaboration among the CSA and the IAs, the IAs and the DIH, and the creation of alliances with other actors of the ecosystem.

### 5.1 Monthly calls

The main mean of communication with IAs will be the monthly calls, it will be the fora to discuss the advancements of the Joint Engagement plan and define the strategies to be followed. So far 5 monthly calls have been organized, plus different bilateral call to discuss about each of the Open Calls and offer support in the dissemination and communication activities.

### 5.2 Spaces for communication and document sharing

The CSA has created a specific space for communication and document sharing with the IAs and another one to communicate with DIH.

Through the spaces the CSA will try to encourage the dialogue and create links and relationships across the different projects, moreover an effort will be done to establish as well bilateral collaboration between the Innovation Actions themselves to identify synergies.

IAs and DIHs have been invited to create their own online communities in order to retain their audiences and offer targeted information to stakeholders.

### 5.3 I4MS community



I4MS Community is populated with information of I4MS projects, services, open calls and reports and articles that are considered of relevance. It is also an excellent window to sponsor best-in class projects and give visibility to the most innovative results and project advancements.

A specific microsite to join the community has been created, where the different advantages to join the community are highlighted.

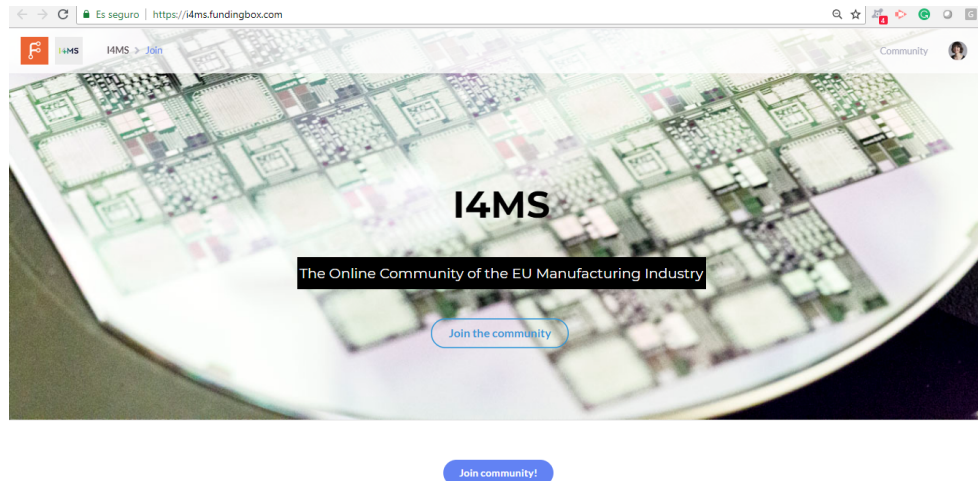


Figure 19. Screenshot of the I4MS community site

## 6 CONCLUSION

I4MS partners, Innovation actions together with the CSA, will work on the detailed activities to **maximise the synergies and avoiding overlapping across ecosystems**. Consequently, it will contribute to promote a joint approach and branding of I4MS, making possible a bigger recognition of the initiative outside the ecosystem and among end-users.

The creation of this Joint Engagement plan fosters the creation cross-border collaborations across IAs leading to a greater cooperation in dissemination and communication activities and in relevant topics of common interest such as the involvement of regions, the use of shared resources and other innovation driven activities. In addition, these collaborations could allow SMEs and mid-caps access to a higher number of digitization opportunities offering access to wider knowledge network and facilities (represented by the Competence centres within the project) and to larger offer of specialised services (innovation support services).

However, there are challenges that stand in the way of cross-border collaboration, such as the different technological areas covered by the initiative and maturity levels of each of the technologies and project activities and objectives. The first step of the Joint Engagement plan that was the stocktaking exercise allowed the creation of a comprehensive list of activities in which all IAs of the phase 3 and the CSA could collaborate.

This second deliverable shows already some results of this joint collaboration and paves the way for the continuous collaboration with specific activities and with clearer ideas about how to deploy this collaboration in reality.

The efforts of the CSA and the IAs in communicating, responding and contributing whenever is possible to the request of the EC and those of this collaboration plan, shows the importance of this exercise as way to facilitate and endeavour the creation of cross-projects collaboration activities.

During this second period that start in September 2018 an effort will be done in fostering the discussions around important topics that will contribute to the achievement of projects objectives from one side and the I4MS objectives from the other.



## ANNEX 1 - Survey

### I4MS Skills Catalogue

I4MS has launched this activity that will consist on a specific catalogue of training skills needed and training offers provided across Europe that will be created through the curation of educational materials already developed by the Innovation Actions involved in the I4MS initiative among others. This Observatory will contribute to improve the visibility of the activities related to skills carried out.

#### Innovation Actions' contribution

This survey will help to define the IA's contribution to the skills label content:

1. Which activities are your Innovation Action developing regarding training and skill development?

If yes:

- a. Written Materials
- b. Workshops
- c. Webinars
- d. Online videos

1. Which is the objective of these activities?
2. Are you assessing gaps in the skills required for the implementation experiments in your project?
3. Are you referencing the skills to any technological framework?
4. Are there activities defined in your project for closing those skill gaps?
5. Do you think that having them would improve the impact of your project?
6. Is there any contact person for the Skills/Training development in your organisation?