D.T2.1.4

Validated Toolbox supporting RTO in transnational SME servicing
REPORT 1 "Service Provision"

Final Version
02.02.2020

Document Control Sheet

Work Package Number	WP T2
Work Package Title	New and advanced transnational KET services to SME across CE
Activity Number	A.T2.1
Activity Title	Study Visits 1+2: Available practice in transnational service provision + attractive business models
Deliverable Number	D.T2.1.4
Deliverable Title	**Validated** Toolbox including minimum 5 tools supporting RTO in transnational SME servicing Report 1 "Service Provision"
Dissemination level	Confidential
Main author	Birgit Feketeföldi (JOANNEUM RESEARCH)
Contributors	Kinga Lorencz (BZ), Tomaz Lutman (JSI), Maria Belegratis (JR) Michael Wurzinger (JR), Georg Jakopic (JR), Paul Hartmann (JR), Daniele Cozzi (JR), Maria Sole D'Orazio (VI), Jennifer Bilbao (SEZ)
Quality Assurance	SEZ

Versioning and Contribution History

Version	Date	Author/Editor /Reviewer	Contributors	Description Comments
_v01	28/10/2019	Birgit Feketeföldi (JR)	Daniele Cozzi (JR) Maria Belegratis (JR) Michael Wurzinger (JR) Paul Hartmann(JR) Georg Jakopic	Conception of topics Bullet points First draft of the report
_v02	01/12/2019	Birgit Feketeföldi (JR)	Kinga Lorencz (BZ) Tomaz Lutman (JSI) Maria Sole D'Orazio (VI)	Second draft of the report
_v03	01/14/2019	Jennifer Bilbao (SEZ) Alejandra Campos (SEZ)		Quality assurance
_final	02/02/2020	Birgit Feketeföldi (JR)		Final report

Document last saved on	02/02/2020

Table of Contents

List of Tables

List of Figures

List of Abbreviations

AP	Associated partner
BSO	Business Support Organisation
BZN	Bay Zoltán Nonprofit Ltd. for Applied Research
CE	Central Europe
GAPR	Upper Silesian Agency for Entrepreneurship and Development
LP	Lead partner
JR	JOANNEUM RESEARCH Forschungsgesellschaft mbH
JSI	Jožef Stefan Institute
KET	Key Enabling Technologies
NCA	National Cluster Association
PP	Project partner
RTO	Research Technology Organisation
SEZ	Steinbeis-Europa-Zentrum
SME	Small and medium-sized enterprises
TERA	Tera Tehnopolis Ltd.
VI	Veneto Innovazione
WP	Work package

1. Executive Summary

In D.T2.1.3 a draft toolbox to support RTO in servicing SMEs was developed as part of the activity "Available practice in transnational service provision and attractive business models".

The tools presented in the draft toolbox were divided into the following five service packages:

Service Package 1:   Promotion of RTOs services

Service Package 2:   Strengthening & facilitating SME/RTO cooperation

Service Package 3:   Strengthening RTO-RTO cooperation for the benefit of the SMEs

Service Package 4:   Training program for RTOs (from invention to the market)

Service Package 5:   Financial supporting schemes (Bridging the "Valley of Death")

The aim of this deliverable is to describe the validated selected tools by taking into account the lessons learnt and possible gaps determined during the pilot phase of the bilateral projects.

These following five tools were selected on the feedback of the RTOs partners about the piloting (D.T3.3.4). The tools are described in separate reports:

Report 1:   **Service Provision**

Report 2:   **Technology Description**

Report 3:   **Contacting & Visiting SMEs**

Report 4:   **Template for Report**

Report 5:   **Success Story**

This **report (1)** describes the validated services of the tool **"Template for Service Provision"**.

1.1. Executive Summary of Report 1: Template for Service Provision

This **Report 1** presents the validated tool "Template for Service Provision", which was developed to promote RTO services for SMEs on the KETGATE *"Facilitating your cooperation with RTOs"* homepage. It highlights RTO **competencies**, the **market of application** and **infrastructures** of RTOs. **Additional information** such as the technology profile, patent, reference project, publication and added services are as well available on this page. Templates for these contents have also been developed as part of the toolbox. These templates can be found in the Appendix.

The first version of the tool is described in the draft Toolbox to support RTOs in SMEs servicing (D.T.2.1.3). The evaluation of the tool was performed by the RTOs and is documented in the joint evaluation report D.T3.3.4.

Figure 2: Template for "Service Provision"

The template is divided into 8 sections:
- **Section 1** of the template shows the **first page** with the RTO institute/name of the Business Advisor, contact details and date.
- **Sections 2,3 & 4** of the template show the name of the **RTO Institute**, the **KET facilitator, contact details** and the **URL** of the RTO website.
- **Section 5, 6 & 7 of the template contain the "News/Events", "Jobs" and "Funds" provided by the RTO.**
- **Section 8 & 9** describe the **"RTO services"** focusing on the needs of SMEs and the main **"KET technologies"** of the Institute.
- **Section 10** shows a list of the Institute`s **"Research Areas"** (level 1) and in the second level (level 2) the description of the Research Areas with meaningful **"Images of the Research Technologies"**.
- **Section 11** contains the **"RTO competences"** with four different chapters (11a, 11b, 11c 6 11d):
  - ○ **Section 11a** shows the **"Products services & Technological Solutions"** and a **"Picture of the Technology"**.
  - ○ **Section 11b** lists the **"Market of Application"**.

- o **Section 11c** contains the corresponding **"Infrastructure"** (divided into research competencies) and in the second level a detailed list of the infrastructure & methods for the Research Areas with memorized pictures.
- o **Section 11d** contains the relevant **"More information"** with the links to **"Technology Profile"**, **"Patent"**, **"Reference Project"**, **"Publication"** and **"Added Services"** where the RTO is well established.

2. Introduction and aim of the Report 1

The aim of the deliverable D.T2.1.4 is to validate the draft toolbox that has been developed in D.T2.1.3 and to select at least 5 tools to support RTOs in their transnational SME servicing.

The RTOs as knowledge carriers and key players discussed the practicability and suitability of the tools during the pilot phase of bilateral projects. The results for validation and implementation of the tools are henceforth presented in the deliverable (D.T3.3.4).

The tool "Template for Service Provision" was examined by Bay Zoltán Nonprofit Ltd. for Applied Research (BZ), JOANNEUM RESEARCH (JR) and Jožef Stefan Institute (JSI) during the pilot operation phase of the bilateral projects. The effectiveness of this tool was evaluated. The findings (Lessons Learnt) and possible gaps of the developed tool (Draft Toolbox) are summarized in Table 1.

This report presents a final template for creating KETGATE homepage`s Service Provision.

Table 1: Extract from the report D.T3.3.4: Evaluated tool 2A "Template for Service Provision"

Tool	Implemented Yes / No / upcoming	Strength	Weakness	Recommendation	Integration in KETGATE Yes / No
Tool 2a Service Provision Tool 2A Service Provision	YES	• Quick to use • Good overview • Highlighting key-expertise's	• Depends on proactive RTOs	• Should be used during the first contact • Add short RTO description (because tools 2C and 2D shall be deleted) • Specify the services so that the BA could better see the range and complementarities of services rather than the overlapping among RTOs • This information can be complemented with a short brochure about the RTO as a PDF in the Cloud and or Website.	YES

3. Methodology: Validation of tools and good practice

Each tool was analysed by means of strengths and weakness gaps in the previous deliverable D.T 3.3.4. The revisions of the RTO partners were taken into the account and incorporated into the template. The tool also provides detailed information on RTO service provision of the KET technologies for SMEs. The document serves as a **basic template and guarantees a uniform appearance of the KETGATE website.** Moreover, this template is accessible and can be used in future projects. The contents of the "Service Provision" are published on the KETGATE website in *"Services for SMEs": https://ketgate.eu/services-for-smes/providing-you-information-on-rto-services* within the block *"Facilitating your cooperation with RTOs"*.
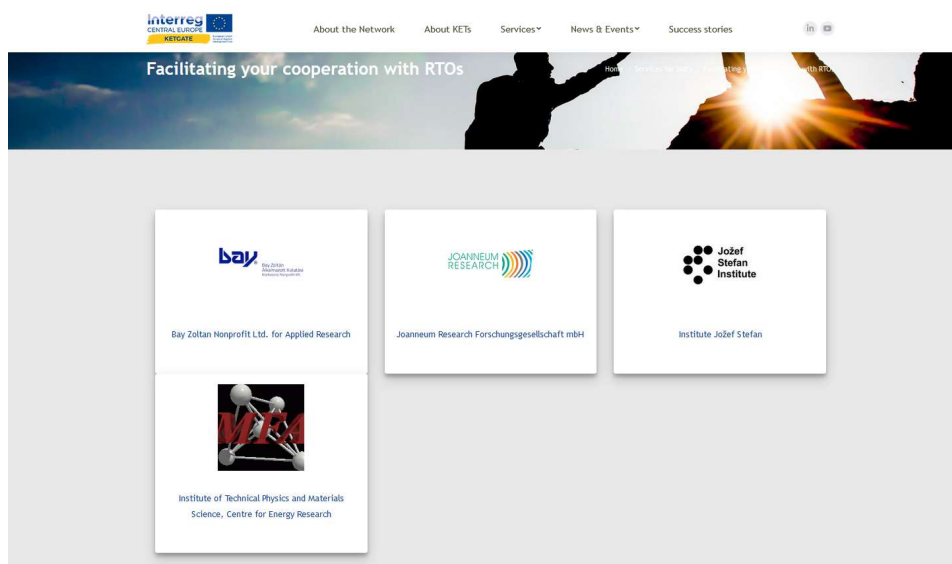

Figure 3: "Service Provision" of RTOs on KETGATE website (www.ketgate.eu): Services for SMEs\ Facilitating your cooperation with RTOs

4. Results

4.1. Template Service Provision of the RTOs

The template is attached in the Annex. The template is divided into 11 sections and allows the RTO to describe the service provision within the KETGATE network in a consistent way. The aim is to offer the RTO's services to SMEs on the KETGATE website.

- **Section 1: First Page of the template**

The first page of the template contains the name of the RTO institute & KETGATE Business Advisor with the contact details of the Business Advisor and the current date.

- ## Section 2, 3 & 4 of the template

Sections 2,3 & 4 of the template show the name of the **RTO Institute**, the **KET facilitator,** the **contact details of the KET facilitator** and the **URL** of the RTO website. In general, the KET Facilitator is the head of the RTO research group within the **Institute**.

- ## Section 5, 6 & 7: News/Event, Jobs & Funds

These sections contain more information about the currently news/events/jobs of the RTO. In practice, links will be available to the own RTO`s own website with the latest updates. The contents of "Funds" inform SMEs about the current national & international funding of scientific work.

- ## Section 8 & 9: RTO Description & KET Technologies

Section 8 provides a brief description of the RTO (max. 1000 characters) focusing on the KET technologies with TRL 6-7 and on the expected needs of SMEs, e.g. the RTO supporting SMEs in the development of pilot lines & prototypes. Section 9 lists the main KET technologies offered by the RTO.

- ## Section 10: Research Areas of RTO

There are two levels to promote the research areas of RTO on the KETGATE website. Level 1 shows a list of the offered research areas and level 2 gives the details and the picture of the selected research area. The goal of using the two level is to give a better & short overview of the website.

- ## Section 11: RTO Competences

Section 11 contains four different chapters:

11a: Products Services & Technological Solutions
The section provides a summary of RTO competences, e.g. development or optimization of products & technological processes. A meaningful picture supports the documentation of the competences.
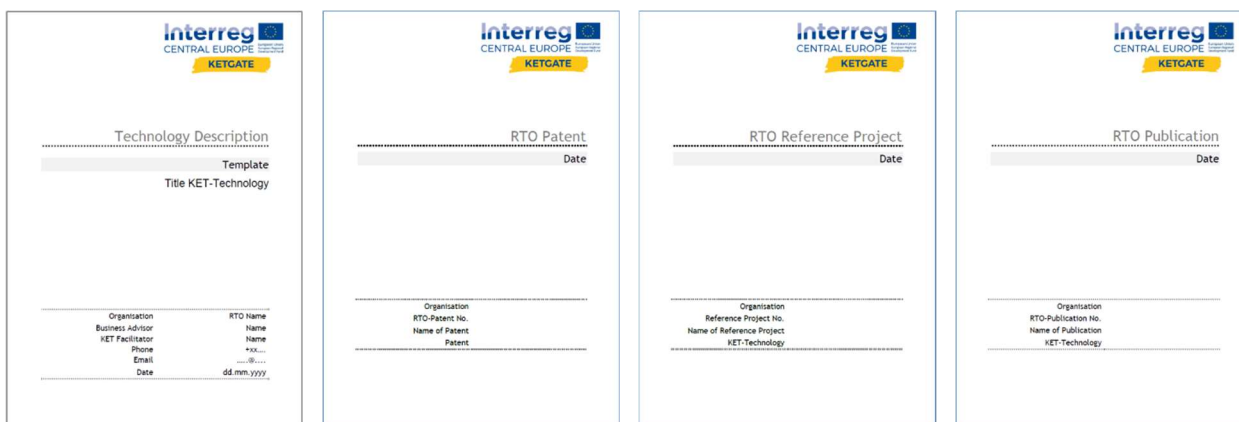
11b: Market of Application
The list of the application is divided into the main research areas. For a better understanding, it is proposed to describe the application briefly instead of using only keywords.

11c: Infrastructure
The infrastructure & methods of the RTO are asigned to the main research areas, e.g. Nanoimprint lithography, printing & coating processes, or surface characterization. This list represents level 1. The second level (Level 2) shows details and images of the existing infrastructure & methods.

11d: More information
The "More information" supplies links (buttons) to further RTO services. The templates for the description of the "Technology profile", "Patent", "Reference project" and "Publication", the contents of which are published on the KETGATE website, are attached in the annex (Figure 3).

| Technology Profile | Patent | Reference Project | Publication |

Figure 4: Templates for the description of "Technology profile", "Patent", "Reference project" & "Publication" (see Annex)

The "added Services" contain information about further services offered by RTO, e.g. development of pilot lines. The "added services" are targeted to SMEs needs and underline the broad know-how about the value chain from the idea to the market.

5. Conclusions

In general, the template "**Service Provision**" is part of the draft toolbox to support RTOs in transnational SME servicing. The tool has been proposed to support RTOs to describe services provided by the RTO. RTOs' services have already been published on the KETGATE website to inform SMEs about the RTO key competences. **Figure 4** shows the structure of the KETGATE website representing the RTO's Service Provision.

During the pilot phase the strengths & weaknesses of the template were explored and discussed. The adapted template shows the implemented proposals. The modified template should help the members of the KETGATE network to create a clearly structured and a consistent website (with corporate identity design) as a suitable information platform for SME users and suppliers of innovative key enabling technologies across Europe.

The information of the template can be complemented by a short brochure about the RTO as a PDF document. The template is the basis for highlighting the key expertise of the RTO and should be used when first contacting SMEs. In addition, the clearly presented RTO services should support the KETGATE business advisor to filter the area of competences, complementarities and overlaps between the RTOs.
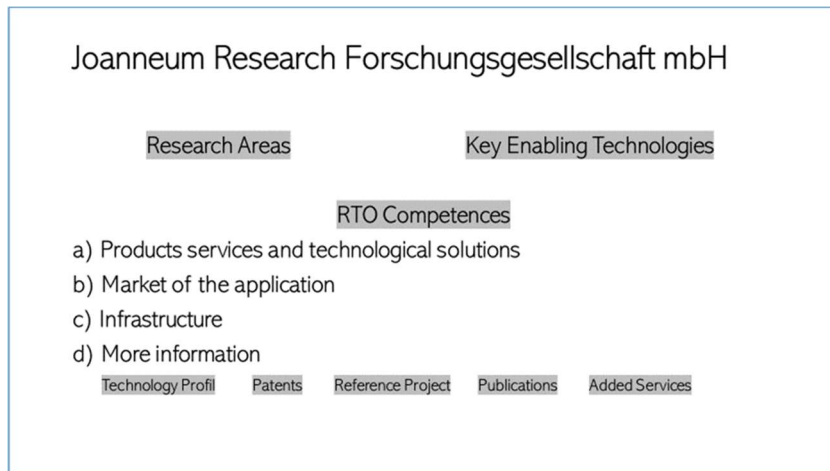
Figure 5: Structure of KETGATE website representing RTO's Service Provision

D.T2.1.4

Validated Toolbox supporting RTO in transnational SME servicing
REPORT 2 "Technology Description"

**Final Version
02.02.2020**

Document Control Sheet

Work Package Number	WP T2
Work Package Title	New and advanced transnational KET services to SME across CE
Activity Number	A.T2.1
Activity Title	Study Visits 1+2: Available practice in transnational service provision + attractive business models
Deliverable Number	D.T2.1.4
Deliverable Title	**Validated** Toolbox including minimum 5 tools supporting RTO in transnational SME servicing Report 2 "Technology Description"
Dissemination level	Confidential
Main author	Birgit Feketeföldi (JOANNEUM RESEARCH)
Contributors	Kinga Lorencz (BZ), Tomaz Lutman (JSI), Maria Belegratis (JR) Michael Wurzinger (JR), Georg Jakopic (JR), Paul Hartmann (JR), Daniele Cozzi (JR), Maria Sole D'Orazio (VI), Jennifer Bilbao (SEZ)
Quality Assurance	SEZ

Versioning and Contribution History

Version	Date	Author/Editor /Reviewer	Contributors	Description Comments
_v01	28/10/2019	Birgit Feketeföldi (JR)	Daniele Cozzi (JR) Maria Belegratis (JR) Michael Wurzinger (JR) Paul Hartmann (JR) Georg Jakopic	Conception of topics Bullet points First draft of the report
_v02	01/12/2019	Birgit Feketeföldi (JR)	Kinga Lorencz (BZ) Tomaz Lutman (JSI) Maria Sole D'Orazio (VI)	Second draft of the report
_v03	01/14/2019	Jennifer Bilbao (SEZ)		Quality assurance
_final	02/02/2020	Birgit Feketeföldi (JR)		Final report

Document last saved on	02/02/2020

Table of Contents

List of Tables

List of Figures

List of Abbreviations

AP	Associated partner
BSO	Business Support Organisation
BZN	Bay Zoltán Nonprofit Ltd. for Applied Research
CE	Central Europe
GAPR	Upper Silesian Agency for Entrepreneurship and Development
LP	Lead partner
JR	JOANNEUM RESEARCH Forschungsgesellschaft mbH
JSI	Jožef Stefan Institute
KET	Key Enabling Technologies
NCA	National Cluster Association
PP	Project partner
RTO	Research Technology Organisation
SEZ	Steinbeis-Europa-Zentrum
SME	Small and medium-sized enterprises
TERA	Tera Tehnopolis Ltd.
VI	Veneto Innovazione
WP	Work package

1. Executive Summary

In D.T2.1.3 a draft toolbox to support RTO in servicing SMEs was developed as part of the activity "Available practice in transnational service provision and attractive business models".

The tools presented in the draft toolbox were divided into the following five service packages:

Service Package 1:   Promotion of RTOs services

Service Package 2:   Strengthening & facilitating SME/RTO cooperation

Service Package 3:   Strengthening RTO-RTO cooperation for the benefit of the SMEs

Service Package 4:   Training program for RTOs (from invention to the market)

Service Package 5:   Financial supporting schemes (Bridging the "Valley of Death")

The aim of this deliverable is to describe the validated selected tools by taking into account the lessons learnt and possible gaps determined during the pilot phase of the bilateral projects.

These following five tools were selected on the feedback of the RTOs partners about the piloting (D.T3.3.4). The tools are described in separate reports:

Report 1:   **Service Provision**

Report 2:   **Technology Description**

Report 3:   **Contacting & Visiting SMEs**

Report 4:   **Template for Report**

Report 5:   **Success Story**

This **report (2) describes the** validated services of the tool "**Template for Technology Description**".

1.1. Executive Summary of Report 2: Template for Technology Description

This **Report 2** presents the validated tool "Template for Technology Description" which was developed to promote RTOs services highlighting the benefit of the technology for the SMEs and the important topics such as application, reference projects, research area of the technology, success story and testimonials.

The first version of the tool is described in the draft Toolbox to support RTOs in SMEs servicing (D.T.2.1.3), and the evaluation of the tool in which the RTOs participated is documented in the joint evaluation report (D.T3.3.4).
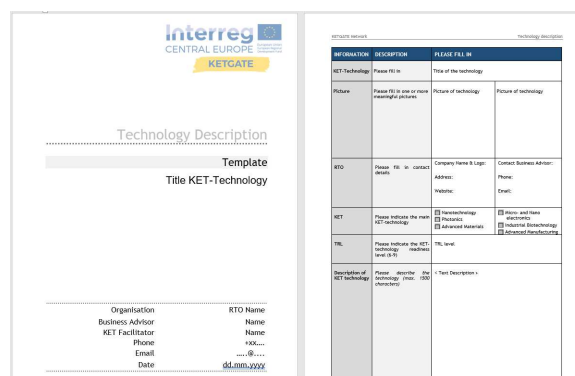

Figure 1: Template for "Technology Description"

The template is divided into 15 sections:

- **Section 1** of the template depicts the **first page** with name of RTO institute/business advisor/KET facilitator, contact data and the date.
- **Sections 2 & 3** of the template describe the "**Title of the KET-Technology**" and show a meaningful "**Picture**".
- **Section 4 & 5 & 6** describe the "**RTO contact details**", select the main "**KET-Technology**" and show the "**TRL-level**" of the technology.
- **Section 7** shows a short and understandable "**Description of the technology**".
- **Section 8** contains the "**Key benefits of the technology for the SMEs**".
- **Section 9 & 10** show the "**What are clients saying about this technology**" and a "**Picture of the testimonial**".
- **Section 11** gives the opportunity to add the "**News**", "**Publication**" and "**Success Story**".
- **Section 12** describes the appropriate "**Application**" for this technology.
- **Section 13 & 14** contain the relevant "**Reference Projects**" and "Research Area" in which the technology is used.
- **Section 15** describes the main competences and "**Services**" of the RTO institute.

2. Introduction and aim of the Report 2

The aim of the deliverable D.T2.1.4 is to validate the draft toolbox developed in D.T2.1.3 and to select at least 5 tools to support RTOs in their transnational SME servicing.

The RTOs as knowledge carriers and key players discussed the practicability and suitability of the tools during the pilot phase of bilateral projects and the results for validation and at least implementation of the tools are henceforth presented in the deliverable (D.T3.3.4).

The tool "Template for Technology Description" was examined by Bay Zoltán Nonprofit Ltd. for Applied Research (BZ), JOANNEUM Research (JR) and Jožef Stefan Institute (JSI) during the pilot operation phase of the bilateral projects. The effectiveness of this tool was evaluated. The findings (Lessons learnt) and possible gaps of the developed tool (Draft Toolbox) are summarized in Table 1.

This report presents a final template for creating technology description.

Table 1: Extract from the report D.T3.3.4: Evaluated tool 2E "Template for Technology Description"

Tool	Implemented Yes / No / upcoming	Strength	Weakness	Recommendation	Integration in KETGATE Yes / No
Tool 2E Technology Description	YES	• Good overview for technology (e.g. pictures, description and keywords) • Useful both for BA and clients to understand the potential expertise available	• Templates were bugged • Two templates for one tool	• Unify and debug both templates	YES

3. Methodology: Validation of tools and good practice

Each tool was analysed by means of strengths and weakness gaps in the previous deliverable D.T 3.3.4. The revisions of the RTO partners were taken into the account and incorporated into the template. The tool also provides detailed information on how to describe a KET-Technology for the SME. The document serves as a **basic template and guarantees a uniform appearance on KETGATE website.** Moreover, this template is accessible and can be used in future projects. The technology descriptions are published on the KETGATE website in *"Services for SMEs"*: *https://ketgate.eu/services-for-smes/providing-you-information-on-rto-services* within the block **"RTO services"**.
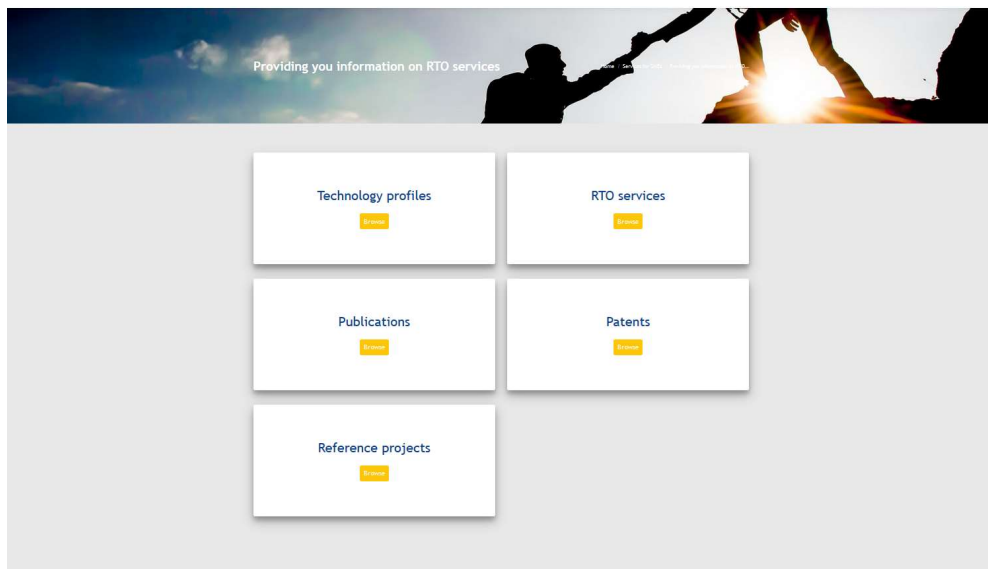

Figure 2: Location for "Technology Description" on KETGATE website (www.ketgate.eu): Services for SMEs\ RTO services

A list of current technology descriptions from the three main partner RTO institutes, which can be found on the KETGATE website currently published, is visualised in Annex 6.1.

4. Results

4.1. Template for Report

The template is attached in the annex. The template is divided into 15 sections and allows the RTO to describe the technology uniformly within the KETGATE network. The aim is to provide a description of the KET technology for the KETGATE website for SMEs.

- **Section 1: First Page of the template**

The first page of the template contains the title of the KET technology, the RTO institute, the name of the KETGATE's business advisor, the name and the contact details of the KET Facilitator and the current date when the description for the website will be published. In general, the KET Facilitator is the head of the RTO research group within the institute.

- ## Section 2: Title of the KET-Technology

The section contains the title of the KET technology. This KET is also part of any RTO website where further information is offered. A link to the RTO website is available in section 7.

- ## Section 3: Picture

The section shows meaningful images, maps, graphics or pictures with the aim of facilitating the understanding of the technology for SMEs.

- ## Section 4: RTO

Section 4 of the template contains the contact details of the RTO providing the technology and the contact details of the KETGATE business advisor.

- ## Section 5: KET

This section describes the applied KET technology. For a better overview only the most important key enabling technology should be given: Nanotechnology, Photonics, Advanced Materials, Micro- and Nanoelectronics, Industrial Biotechnology and Advanced Manufacturing.

- ## Section 6: TRL of the Technology

The section shows the technology readiness level (TRL) of the KET technology. The TRL level indicates the degree of maturity of the technology during the project phase. In the KETGATE network only KET technologies with TRL levels between 6 and 9 are considered. RTO`s technologies with lower TRL level cannot be offered to primarily producing SMEs and are therefore subject of research projects.

- ## Section 7: Description of the KET-Technology

The section contains the description of the KET technology. In this short summary, the technological process is described in terms of its purpose, its function and the relevant details. The description is based on the required specification and characterization of the KET technology. An additional high level of technical details can be found on the RTO websites, so that is not necessary to overload the KETGATE description page (length max. 1500 characters). A link to the RTO`s homepage with the corresponding technology is available at the end of the description (URL).

- ## Section 8: Key benefit of the KET-Technology for SMEs

The section contains supporting information on the benefits of KET technology. These main advantages make the technology more effective and attractive for SMEs e.g.: process is fast & simple, cost-effective, flexible and user-friendly. In the technology description of KETGATE there is a limit of three benefits.

- ## Section 9: What are clients saying about this technology

The section 9 contains the name, the company and the testimonial`s statement. The testimonial speaks about the efficiency of the process and helps SMEs to gain confidence in the innovative technology.

Effective is a differentiated statement that is positive, but also points out possible limitations of the technology. The testimonial always offers added value for SMEs (max. 2-3 sentences).

- ### Section 10: Picture of the testimonial

Ideally, a meaningful picture of the testimonial should be published.

- ### Section 11: News/Publication/Success Story

The document (website) provides information on the latest development and research activities in the KET technology. Corresponding future events can also be published here to arouse more interest for the KET technology.

Available scientific publications are represented by the title, date and URL of the published work from scientific publishers.

The link to published success story (KETGATE website) is placed here.

- ### Section 12: Application

The section shows the different areas where the technology can be commercially exploited to design a product, process or treatment. In the template there is a limit of ten applications.

- ### Section 13: Reference Project

The section contains information about reference projects. The description of the reference project envelops title and a short & concise summary of the project with the main topics: 1) Aim of the project, 2) Methodology/ Scientific know-how of the applied technology, 3) Problem solving, 4) Development/ Modification of project/product/treatment, 5) Scientific & Economic results and 6) future trends/ Applications (max. 3 reference projects/ each max. 1000 characters).

- ### Section 14: Research Area

The section shows the research area that can be applied to the corresponding KET technology. Only the latest and best research fields should be listed (max. 5 research areas).

- ### Section 15: Services

The section contains the main competences and services of the RTO institute, for instance: 1) **Scientific and technological advice** is provided for interdisciplinary solutions across the entire value, 2) **State-of-the-art equipment** and **infrastructure** are offered in order to fulfil the needs of business and industry and 3) **Support SMEs** with innovation projects and helping them to get superior products to market faster.

5. Conclusions

The template **"Description Technology"** is part of the draft toolbox to support RTOs in transnational SME servicing. The KET technologies will be published on the KETGATE website to inform SMEs about RTO services:
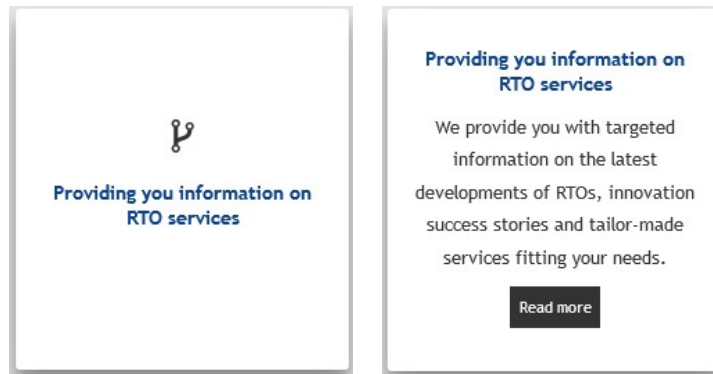

Figure 3: "Technology Description" on KETGATE website: Services for SMEs

The tool has been proposed to support RTOs in the description of KET technologies. Furthermore, the tool guarantees a uniform appearance of the RTOs services (corporate identity design) within the KETGATE network.

The template shows the classification: 1) KET technology with image & TRL level and RTO contact data, 2) Description of the KET technology with URL to the RTO homepage/website, 3) Key benefits for SMEs, 4) Testimonial with meaningful picture, 5) News, publication and URL to success story, 6) Application, 7) Reference project, 8) Research Area and 9) Main services of RTO.

The KET technologies of BZ, JR and JSI currently published on KETGATE website are listed in the Annex 6.1.

The aim is to reach a broad spectrum of KET technologies represented in the network (main and follower RTO partners) in order to create a suitable information platform for SME users and suppliers of innovative key enabling technologies across Europe.

D.T2.1.4

Validated Toolbox supporting RTO in transnational SME servicing

REPORT 3 "Contacting & visiting SMEs"

Final Version
02.02.2020

Document Control Sheet

Work Package Number	WP T2
Work Package Title	New and advanced transnational KET services to SME across CE
Activity Number	A.T2.2
Activity Title	Study Visits 1+2: Available practice in transnational service provision + attractive business models
Deliverable Number	D.T2.1.4
Deliverable Title	**Validated** Toolbox including minimum 5 tools supporting RTO in transnational SME servicing Report 3 "Contacting & visiting SMEs"
Dissemination level	Confidential
Main author	Birgit Feketeföldi (JOANNEUM RESEARCH)
Contributors	Kinga Lorencz (BZ), Tomaz Lutman (JSI), Maria Belegratis (JR) Michael Wurzinger (JR), Georg Jakopic (JR), Paul Hartmann (JR), Daniele Cozzi (JR), Maria Sole D'Orazio (VI), Jennifer Bilbao (SEZ)
Quality Assurance	Jennifer Bilbao, Alejandra Campos (SEZ)

Versioning and Contribution History

Version	Date	Author/Editor/Reviewer	Contributors	Description/Comments
_v01	28/10/2020	Birgit Feketeföldi (JR)	Maria Belegratis (JR)Michael Wurzinger (JR) Georg Jakopic (JR) Paul Hartmann (JR) Daniele Cozzi (JR)	Conception of topics bullet points First Draft of the report
_v02	1/12/2019	Birgit Feketeföldi (JR)	Kinga Lorencz (BZ) Tomaz Lutman (JSI) Maria Sole D'Orazio (VI)	Second draft of report
_v03	1/14/2019	Jennifer Bilbao (SEZ) Alejandra Campos		Quality assurance
_final	02/02/2020	Birgit Feketeföldi (JR)		Final report

Document last saved on	02/02/2020

Table of Contents

List of Tables

Table 1: Evaluated tool of Service Package 2

List of Figures

Figure 1: Template for "Contacting & Visiting SMEs"

List of Abbreviations

AP	Associated partner
BSO	Business Support Organisation
BZN	Bay Zoltán Nonprofit Ltd. for Applied Research
CE	Central Europe
GAPR	Upper Silesian Agency for Entrepreneurship and Development
LP	Lead partner
JR	JOANNEUM RESEARCH Forschungsgesellschaft mbH
JSI	Jožef Stefan Institute
KET	Key Enabling Technologies
NCA	National Cluster Association
PP	Project partner
RTO	Research Technology Organisation
SEZ	Steinbeis-Europa-Zentrum
SME	Small and medium-sized enterprises
TERA	Tera Tehnopolis Ltd.
VI	Veneto Innovazione
WP	Work package

1. Executive Summary

In D.T2.1.3 a draft toolbox to support RTO in servicing SMEs was developed as part of the activity "Available practice in transnational service provision and attractive business models".

The tools presented in the draft toolbox were divided into the following five service packages:

Service Package 1:   Promotion of RTOs services
Service Package 2:   Strengthening & facilitating SME/RTO cooperation
Service Package 3:   Strengthening RTO-RTO cooperation for the benefit of the SMEs
Service Package 4:   Training program for RTOs (from invention to the market)
Service Package 5:   Financial supporting schemes (Bridging the "Valley of Death")

The aim of this deliverable is to describe the validated selected tools taking into account the lessons learnt and possible gaps determined during the pilot phase of the bilateral projects.

These following five tools were selected on the feedback of the RTOs partners about the piloting (D.T3.3.4). The tools are described in separate reports:

Report 1:   **Service Provision**
Report 2:   **Technology Description**
Report 3:   **Contacting & Visiting SMEs**
Report 4:   **Template for Report**
Report 5:   **Success Story**

This **report (3) describes the** validated services of the tool "**CONTACTING & VISITING SMEs**".

1.1. Executive Summary of Report 3: Contacting & Visiting SMEs

This **Report 3** presents the validated tool "Contacting & visiting SMEs", which was developed to strengthen the relationship between SMEs and RTOs in transnational SME servicing.

The tool, which **serves as a checklist for contact & visit of SMEs,** is described in the draft Toolbox to support RTOs in SMEs servicing (D.T.2.1.3), and the evaluation of the tool in which the RTOs participated is documented in the joint evaluation report (D.T3.3.4).

Figure 1: Template for "Contacting & Visiting SMEs"

The template is divided into six sections:

1. Sections 1 & 2 of the template describe the **contact details** of the SMEs and the **key enabling technologies** applied.
2. Section 3 describes the **"Get in Contact"** phase: One of the challenges for the business advisors is the collection of customer contact information. The template lists the most important ways to get in contact with SMEs.
3. Section 4 contains the **"Preparation for Visit"** phase with a checklist of essential documents to support the business advisor in servicing SMEs.
4. Section 5 shows the **"Next Steps"** phase and supports the business advisors how to stay in contact with SMEs.
5. Section 6 gives the opportunity to **review** the visit.

2. Introduction and aim of report 3

The aim of the deliverable D.T2.1.4 is to validate the draft toolbox developed in D.T2.1.3 and to select at least 5 tools to support RTOs in their transnational SME servicing.

The RTOs as knowledge carriers and key players discussed the practicability and suitability of the tools during the pilot phase of bilateral projects and the results for validation and at least implementation of the tools are henceforth presented in the deliverable (D.T3.3.4).

The tool "Contacting & visiting SMEs" was examined by Bay Zoltán Nonprofit Ltd. for Applied Research (BZ), JOANNEUM Research (JR) and Jožef Stefan Institute (JSI) during the pilot operation phase of the bilateral projects. The effectiveness of this tool was evaluated. The findings (Lessons Learnt) and possible gaps of the developed tool (Draft Toolbox) are summarized in Table 1.

This report presents a final template for contacting & visiting SMEs.

Table 1: Extract from the report D.T3.3.4: Evaluated tool 7 "Contacting & Visiting SMEs" of Service Package2

Tool	Implemented Yes / No / upcoming	Strength	Weakness	Recommendation	Integration in KETGATE Yes / No
Tool 7 Contacting & visiting proactive SMEs Contacting & visiting proactive SMEs Tool 7	YES	• Business advisor/KET facilitator can have better picture about the technology request of SME	• Time consuming	• Visit innovative companies • It is usually a task performed by BSO, not RTOs	YES

3. Methodology: validation of tools and good practice

Each tool was analysed by means of strengths and weakness gaps in the previous deliverables D.T 3.3.4. It was tried to include all revisions from the RTO partners into the tool. The tool also provides detailed information how to contact and visit proactive SMEs and should support the KETGATE business advisors. The document serves as a **basic checklist for the Smart KET Access Point operation.** However, this template is recently accessible and can be used in future projects.

4. Results

Finding customers is one of the most difficult challenges for RTOs & BSOs and established small businesses. In KETGATE, the business advisors have to go out and find potential customers and clients as an ongoing focus. The following considerations can be taken into account by this:

SME information and contact person	-	How to get company information?
	-	Who is the best contact person (CES, production manager)?
Key Enabling Technology	-	This can be possibly defined after the first meeting with the SME
	-	If possible, to define not only the KET in general but the specific technology
Getting in contact	-	What is the best way to contact the SME?
Preparation of the meeting	-	KETGATE provides materials available for this
	-	Can the Service Request (SR) be filled out during the meeting?
Next visits	-	It is important to check the SMEs needs?
	-	To define when the next meeting can take place
Results	-	If a contract is forthcoming?

The final template resulted from the above considerations and the recommendations of the RTO partners.

KETGATE Network Contacting & Visiting proactive SMEs

INFORMATION	DESCRIPTION	PLEASE FILL IN	
SME	Please fill in	Company Name: Website: Phone:	Contact Person: Function: Phone: Email:
SME-Key Enabling Technology	Please indicate the KET-technology of the SME	☐ Nanotechnology ☐ Photonics ☐ Advanced Materials	☐ Micro- and Nano electronics ☐ Industrial Biotechnology ☐ Advanced Manufacturing
Get in Contact	Please indicate your planned activity and if available name of the event	☐ Email ☐ Social Media (Facebook, Twitter, YouTube, Blog) ☐ Events (Congress, Fair) ☐ Mobile (Phone call, WhatsApp, Popup window) ☐ Meetings (B2B) ☐ Focus groups (Workshop, Seminar, Web-conference) ☐ Mailing list (data base, CRM-software) ☐ Others: Details (Date, Name of Organisation):	
Preparation for Visit	Please list the selected documents for your visit of the SME	☐ Brochure, Prospects, Video, Technology Excel Spread-sheets ☐ Innovation Audit (template) ☐ Presentation (KETGATE, RTO), Success Stories ☐ Service Request (template) ☐ Survey what SMEs say about KETGATE (template) ☐ Others:	
Next Steps after Visit	Check the customer`s needs and indicate the planned activities	☐ Sending Email ☐ Sending Newsletter ☐ Inviting to Webinar ☐ Inviting to Events (Workshop, Congress, Fair) ☐ Admitting to Social Media ☐ Defining next meeting ☐ Others:	
Results	Please describe the outcomes	SME interested in KETGATE Services ☐ Yes ☐ No SME fills out KETGATE Service Request ☐ Yes ☐ No Survey what SME says about KETGATE ☐ Yes ☐ No Contract ☐ Yes ☐ No Remarks:	

4.1. Contact & Visit SME Template

The template is divided into six sections and allows the business advisor to make the contacting & visiting SME process clear and simple.

- **Section 1: SME contact details**

The section contains information on company name and contact person.

- **Section 2: SME – Key Enabling Technology**

The section describes the applied KET technology of the SME.

- **Section 3: Get in contact**

Section 3 of the template contains several proposals for contacting SMEs. The best ways are direct contact via email, social media (Facebook, Twitter, YouTube and Blog) and events (congress and trade fair). It is always a good way to pick up the phone and arrange meetings (e.g.: B2B meetings). Other suggestions are focus groups and the use of mailing lists (e.g.: CRM Software).

- **Section 4: Preparation for visit**

The template also serves as a checklist for the business advisors in order to prepare for the personal visit. Various documents are available for the information of SMEs (e.g.: brochure, prospects video, technology Excel spreadsheet, presentation and success stories). The templates Innovation Audit, Service Request and Survey (what SMEs say about KETGATE) are further documents that complete the SME visits.

- **Section 5: Next steps**

An essential point of the visit is the "How to stay in contact" phase with the SME. Various activities (e.g.: e-mails, newsletter, invitation to planned webinars or events, inclusion in social media) and a new personal next meeting are suggested in the template and should be requested.

- **Section 6: Results**

The business advisor asks for feedback from the SME regarding KETGATE service. The completed service request & survey, what SME says about KETGATE, shows the final response of the SME visit.

5. Conclusion

The tool has been proposed to support the KETGATE business advisors in contacting & visiting SMEs. In addition, the tool should strengthen the collaboration between RTOs and SMEs within KETGATE.

The template shows the different ways 1) how to get in contact and 2) how to stay in contact with them. Both are very important to win new customers, to check customer`s needs and to satisfy the customer. Another essential point is never to leave the customer without defining the next meeting.

With the help of the essential documents (e.g.: brochure, Excel tables of KET technology and video), the business advisor informs the SME about all offered KETGATE technologies and the transnational cooperation of the KETGATE RTOs. In addition, various documents are made available, e.g. to carry out an innovation audit during the on-site visit. Furthermore, the business advisor receives a better picture of the SME and its ability to innovate, so that the service request can be prepared in a targeted manner by the BA together with the SME.

The final template is just a document to fill. The overview of the main work flow and description of all the steps below has to be prepared by the business advisor, which has to define how to get in contact, to prepare the visit and the next steps after the visits and to document the results.

D.T2.1.4

Validated Toolbox supporting RTO in transnational SME servicing
REPORT 4 "TEMPLATE for "REPORT"

Final Version
02.02.2020

Document Control Sheet

Work Package Number	WP T2
Work Package Title	New and advanced transnational KET services to SME across CE
Activity Number	A.T2.1
Activity Title	Study Visits 1+2: Available practice in transnational service provision + attractive business models
Deliverable Number	D.T2.1.4
Deliverable Title	**Validated** Toolbox including minimum 5 tools supporting RTO in transnational SME servicing Report 4 "Template for Report"
Dissemination level	Confidential
Main author	Birgit Feketeföldi (JOANNEUM RESEARCH)
Contributors	Kinga Lorencz (BZ), Tomaz Lutman (JSI), Maria Belegratis (JR) Michael Wurzinger (JR), Georg Jakopic (JR), Paul Hartmann (JR), Daniele Cozzi (JR), Maria Sole D'Orazio (VI), Jennifer Bilbao (SEZ)
Quality Assurance	Alejandra Campos, SEZ

Versioning and Contribution History

Version	Date	Author/Editor /Reviewer	Contributors	Description Comments
_v01	28/10/2019	Birgit Feketeföldi (JR)	Daniele Cozzi (JR) Maria Belegratis (JR) Michael Wurzinger (JR) Paul Hartmann (JR) Georg Jakopic	Conception of topics Bullet points First draft of the report
_v02	1/12/2019	Birgit Feketeföldi (JR)	Kinga Lorencz (BZ) Tomaz Lutman (JSI) Maria Sole D'Orazio (VI)	Second draft of report
_v03	1/14/2019	Jennifer Bilbao (SEZ)		Quality assurance
_final	02/02/2020	Birgit Feketeföldi (JR)		Final report

Document last saved on	02/02/2020

Table of Contents

List of Tables

List of Figures

List of Abbreviations

AP	Associated partner
BSO	Business Support Organisation
BZN	Bay Zoltán Nonprofit Ltd. for Applied Research
CE	Central Europe
GAPR	Upper Silesian Agency for Entrepreneurship and Development
LP	Lead partner
JR	JOANNEUM RESEARCH Forschungsgesellschaft mbH
JSI	Jožef Stefan Institute
KET	Key Enabling Technologies
NCA	National Cluster Association
PP	Project partner
RTO	Research Technology Organisation
SEZ	Steinbeis-Europa-Zentrum
SME	Small and medium-sized enterprises
TERA	Tera Tehnopolis Ltd.
VI	Veneto Innovazione
WP	Work package

1. Executive Summary

In D.T2.1.3 a draft toolbox to support RTO in servicing SMEs was developed as part of the activity "Available practice in transnational service provision and attractive business models".

The tools presented in the draft toolbox were divided into the following five service packages:

Service Package 1:   Promotion of RTOs services
Service Package 2:   Strengthening & facilitating SME/RTO cooperation
Service Package 3:   Strengthening RTO-RTO cooperation for the benefit of the SMEs
Service Package 4:   Training program for RTOs (from invention to the market)
Service Package 5:   Financial supporting schemes (Bridging the "Valley of Death")

The aim of this deliverable is to describe the validated selected tools by taking into account the lessons learnt and possible gaps determined during the pilot phase of the bilateral projects.

These following five tools were selected on the feedback of the RTOs partners about the piloting (D.T3.3.4). The tools are described in separate reports:

Report 1:   Service Provision
Report 2:   Technology Description
Report 3:   Contacting & Visiting SMEs
Report 4:   Template for Report
Report 5:   Success Story

This **report (4)** describes the validated services of the tool "TEMPLATE for **REPORT**".

1.1. Executive Summary of Report 4: Template for Report

This **Report 4** presents the validated tool "Template for Report", which was developed to strengthen the relationship between SMEs and RTOs in transnational SME servicing.

The first version of the tool is described in the draft Toolbox to support RTOs in SMEs servicing (D.T.2.1.3), and the evaluation of the tool in which the RTOs participated is documented in the joint evaluation report (D.T3.3.4).

Figure 1: Template for preparing "REPORT"

The template is divided into eight sections:

1. Section 1 of the template describes the **"Overview"** of the project with the contact details of the SME, the main RTO institute and partner RTO institute, if involved.
2. Section 2 describes the **"Executive Summary"** and should contain the problems, benefit and results of the project. The content of the summary can theoretically be used for the success story.
3. Section 3 & 4 describe the **"Introduction and aim of the project"** and the **"Methodology"**.
4. Section 5 contains the **"Results"** with a table describing the work packages and milestones according to the work plan of the offer.
5. Section 6 shows the **"Conclusion and Recommendation"** with the subtitle dissemination activities (if planned), economic & scientific exploitation (if available), further R&D activities (if planned) and cost and benefit activities (if available).
6. Section 7 & 8 includes the **"Annex"** and **"Bibliography"**.

2. Introduction and aim of the report 4

The aim of the deliverable D.T2.1.4 is to validate the draft toolbox developed in D.T2.1.3 and to **select at least 5 tools** to support RTOs in their transnational SME servicing.

The RTOs as knowledge carriers and key players discussed the practicability and suitability of the tools during the pilot phase of bilateral projects and the results for validation and at least implementation of the tools is henceforth presented in the deliverable (D.T3.3.4).

The **tool** "Template for Report" was examined by Bay Zoltán Nonprofit Ltd. for Applied Research (BZ), JOANNEUM RESEARCH (JR) and Jožef Stefan Institute (JSI) during the pilot operation phase of the bilateral projects. The effectiveness of the tool of the service package 2 was investigated and evaluated. The findings (Lessons Learnt) and possible gaps of the developed tool (Draft Toolbox) are summarized in Table 1.

This report presents a final template for creating a report.

Table 1: Extract from report D.T3.3.4: Evaluated tool 9F "Template for Report" of Service Package 2

Tool	Implemented Yes / No / upcoming	Strength	Weakness	Recommendation	Integration in KETGATE Yes / No
Tool 9F REPORT	YES	• Obligatory document for SME-RTO cooperation	• A page in the template is arbitrary • Confidential information should not be shared in the report with each partner	• Revise template • Most data is the same as in the SR • The professional report should not be restricted by formatted tables maybe with a checklist for features and necessary info	YES

3. Methodology: Validation of tools and good practice

Each tool was analysed by means of strengths and weakness gaps in the previous deliverable D.T 3.3.4. The revisions of the RTO partners were taken into the account and incorporated into the template. The tool also provides detailed information on how to prepare a report for the SME. The document serves as a **basic template and guarantees a uniform appearance of the KETGATE RTOs.** Moreover, this template is accessible and can be used in future projects.

4. Results

4.1. Template for Report

The template is attached in the annex. The template is divided into eight sections and allows the RTO to prepare the report uniformly within the KETGATE network.

- **Section 1: Overview of the project**

The section contains information about the name and contact person of the SME, RTO and partner RTO. In addition, the overview shows the project duration, project costs and a short synopsis.

- **Section 2: Executive Summary**

The section describes the summary of the project including a checklist (problems, main benefits and results). If a success story is planned, the synopsis can be used to prepare the story (length 1 page, maximum).

- ### Section 3: Introduction and aim of the project

Section 3 of the template contains information about the main topic and the goals of the work. The length should not exceed ½ to 1 page.

- ### Section 4: Methodology

The methodology corresponding to the work plan of the offer shall be described. The description shall also include possible changes of the methodology (length ½ page, maximum).

- ### Section 5: Results

The section contains the results of the work of the RTO. If more than one RTO is involved, two or more reports are produced (length 2-5 pages). It is important that confidential information is not part of the report, as the documents should be exchanged (and be public) within the KETGATE network.

The table 1 can be used to describe the work packages and milestones according to the work plan of the offer. Additional automatically numbered tables, figures and boxes for highlighting are available on request.

- ### Section 6: Conclusion and Recommendation

The section contains the expected impact and the necessary follow-up actions. The conclusion and recommendation should be a logical extension of information. The section also contains a checklist (if conclusion is reached, if follow-up actions are indicated, if the conclusion is consistent with the summary).

Section 6 includes subtitles to describe dissemination activities such as planned success stories, patent and/or paper. If economic and scientific exploitation is planned, a short summary can inform SMEs here. Further R&D activities can also be explained if panned. Cost and benefit activities can be integrated if applicable (length 1-2 pages).

- ### Section 7: Annex

The section contains supporting information if applicable.

- ### Section 8: Bibliography

The template gives information about the literature used

5. Conclusions

The template for preparing a "Report" is part of the draft toolbox to support RTOs in transnational SME servicing.

The tool has been proposed to support RTOs in the preparation of reports. Furthermore, the tool guarantees a uniform appearance of the RTOs (corporate identity design) within the KETGATE network.

The template shows the generally valid classification of a report, but also additionally various topics 1) dissemination activities, 2) economic & scientific exploitation, 3) future R&D activities and 4) cost & benefit activities. These additional features provide more information to SMEs and serve as another promotional tool to show the extended knowledge of the RTOs. It is important to present that the business of the RTO institutes combines scientific and economic know-how of the technological applications, such as conducting cost & benefit analysis.

Joint projects require the creation of two or more reports and should be written without confidential information to enable the exchange of the various documents within the KETGATE network.

The final document contains a comprehensive template for the preparation of a report. With the help of checklists of each sections the RTOs can revise the final document.

D.T2.1.4

Validated Toolbox supporting RTO in transnational SME servicing	**Final Version**
REPORT 5 "Success Story"	**02.02.2020**

Document Control Sheet

Work Package Number	WP T2
Work Package Title	New and advanced transnational KET services to SME across CE
Activity Number	A.T2.1
Activity Title	Study Visits 1+2: Available practice in transnational service provision + attractive business models
Deliverable Number	D.T2.1.4
Deliverable Title	**Validated** Toolbox including minimum 5 tools supporting RTO in transnational SME servicing Report 5 "Success Story"
Dissemination level	Confidential
Main author	Birgit Feketeföldi (JOANNEUM RESEARCH)
Contributors	Kinga Lorencz (BZ), Tomaz Lutman (JSI), Maria Belegratis (JR) Michael Wurzinger (JR), Georg Jakopic (JR), Paul Hartmann (JR), Daniele Cozzi (JR), Maria Sole D'Orazio (VI), Jennifer Bilbao (SEZ)
Quality Assurance	Alejandra Campos (SEZ)

Versioning and Contribution History

Version	Date	Author/Editor /Reviewer	Contributors	Description Comments
_v01	28/10/2019	Birgit Feketeföldi (JR)	Daniele Cozzi (JR) Maria Belegratis (JR) Michael Wurzinger (JR) Paul Hartmann (JR) Georg Jakopic	Conception of topics Bullet points First draft of the report
_v02	01/12/2019	Birgit Feketeföldi (JR)	Kinga Lorencz (BZ) Tomaz Lutman (JSI) Maria Sole D'Orazio (VI)	Second draft of the report
_v03	01/14/2019	Jennifer Bilbao (SEZ) Alejandra Campos (SEZ)		Quality assurance
_final	02/02/2020	Birgit Feketeföldi (JR)		Final report

Document last saved on	02/02/2020

Table of Contents

List of Tables

List of Figures

List of Abbreviations

AP	Associated partner
BSO	Business Support Organisation
BZN	Bay Zoltán Nonprofit Ltd. for Applied Research
CE	Central Europe
GAPR	Upper Silesian Agency for Entrepreneurship and Development
LP	Lead partner
JR	JOANNEUM RESEARCH Forschungsgesellschaft mbH
JSI	Jožef Stefan Institute

KET	Key Enabling Technologies
NCA	National Cluster Association
PP	Project partner
RTO	Research Technology Organisation
SEZ	Steinbeis-Europa-Zentrum
SME	Small and medium-sized enterprises
TERA	Tera Tehnopolis Ltd.
VI	Veneto Innovazione
WP	Work package

1. Executive Summary

In D.T2.1.3 a draft toolbox to support RTO in servicing SMEs was developed as part of the activity "Available practice in transnational service provision and attractive business models".

The tools presented in the draft toolbox were divided into the following five service packages:

Service Package 1:   Promotion of RTOs services
Service Package 2:   Strengthening & facilitating SME/RTO cooperation
Service Package 3:   Strengthening RTO-RTO cooperation for the benefit of the SMEs
Service Package 4:   Training program for RTOs (from invention to the market)
Service Package 5:   Financial supporting schemes (Bridging the "Valley of Death")

The aim of this deliverable is to describe the validated selected tools by taking into account the lessons learnt and possible gaps determined during the pilot phase of the bilateral projects.

These following five tools were selected on the feedback of the RTOs partners about the piloting (D.T3.3.4). The tools are described in separate reports:

Report 1:   Service Provision
Report 2:   Technology Description
Report 3:   Contacting & Visiting SMEs
Report 4:   Template for Report
Report 5:   Success Story

This **report (5)** describes the validated services of the tool "Template for **Success Story**".

1.1. Executive Summary of Report 5: Template for "Success Story"

This **Report 5** presents the validated tool "Templates for Success Story", which was developed to promote RTO services for SMEs on the KETGATE "*Providing you information on RTO services*" homepage. It highlights RTO competencies and shows the successful RTO service in developing & optimizing KET technologies for SMEs. The template & examples can be found in the Appendix.

The first version of the tool is described in the draft Toolbox to support RTOs in SMEs servicing (D.T.2.1.3). The evaluation of the tool was performed by the RTOs and is documented in the joint evaluation report D.T3.3.4.

Figure 1: Template for "Success Story"

The template is divided into 9 sections:
- Section 1 of the template shows the first page with the RTO institute/name of the Business Advisor, name of the KET facilitator & contact details of the Business Advisor & date.
- Sections 2 of the template shows the overview of the "Success Story" with the main information (Story Code, Title of the "Success Story", SME Request Code, Project type, main SME Partner & Contact details, main RTO & Contact details & Author of the "Success Story", KET Technology, Project duration & Run time of the Project, Project Costs and additional information for the Web designer).
- Section 3 of the template contains meaningful images of the evaluated technology.
- Section 4 of the template describes the customer.
- Section 5, 6, 7 & 8 shows the Challenge, the Theme, the Keywords & the Solution of the "Success Story".
- Section 9 contain the description of the Marketing Results.

2. Introduction and aim of the Report 5

The aim of the deliverable D.T2.1.4 is to validate the draft toolbox that has been developed in D.T2.1.3 and to select at least 5 tools to support RTOs in their transnational SME servicing.

The RTOs as knowledge carriers and key players discussed the practicability and suitability of the tools during the pilot phase of bilateral projects. The results for validation and implementation of the tools are henceforth presented in the deliverable (D.T3.3.4).

The tool "Template for Success Story" was examined by Bay Zoltán Nonprofit Ltd. for Applied Research (BZ), JOANNEUM RESEARCH (JR) and Jožef Stefan Institute (JSI) during the pilot operation phase of the bilateral projects. The effectiveness of this tool was evaluated. The findings (Lessons Learnt) and possible gaps of the developed tool (Draft Toolbox) are summarized in Table 1.

This report presents a final template for creating KETGATE homepage`s "Success Story".

Table 1: Extract from the report D.T3.3.4: Evaluated tool 9G "Success Story"

Tool	Implemented Yes / No / upcoming	Strength	Weakness	Recommendation	Integration in KETGATE Yes / No
Tool9G Success Story	YES	• Good overview of best practice • General public has better view about successful projects	• Time-consuming	• Involve RTO-SME cooperation with good results • Very useful for the promotion • should find time and budget for elaboration	YES

3. Methodology: Validation of tools and good practice

Each tool was analysed by means of strengths and weakness gaps in the previous deliverable D.T.3.3.4. The revisions of the RTO partners were taken into the account and incorporated into the template. The tool also provides detailed information on RTO service provision of the KET technologies for SMEs. The document serves as a basic template and guarantees a uniform appearance of the KETGATE website. Moreover, this template is accessible and can be used in future projects. The contents of the "Service Provision" are published on the KETGATE website in "Services for SMEs": https://ketgate.eu/services-for-smes/providing-you-information-on-rto-services.

Before the template was optimized, the key questions to describe a "Success Story" were examined again.

1) Who is the customer?
2) What is the problem?
3) How was the old strategy/technology/process
4) What is the solution?
5) What does the new strategy/technology/process look like?
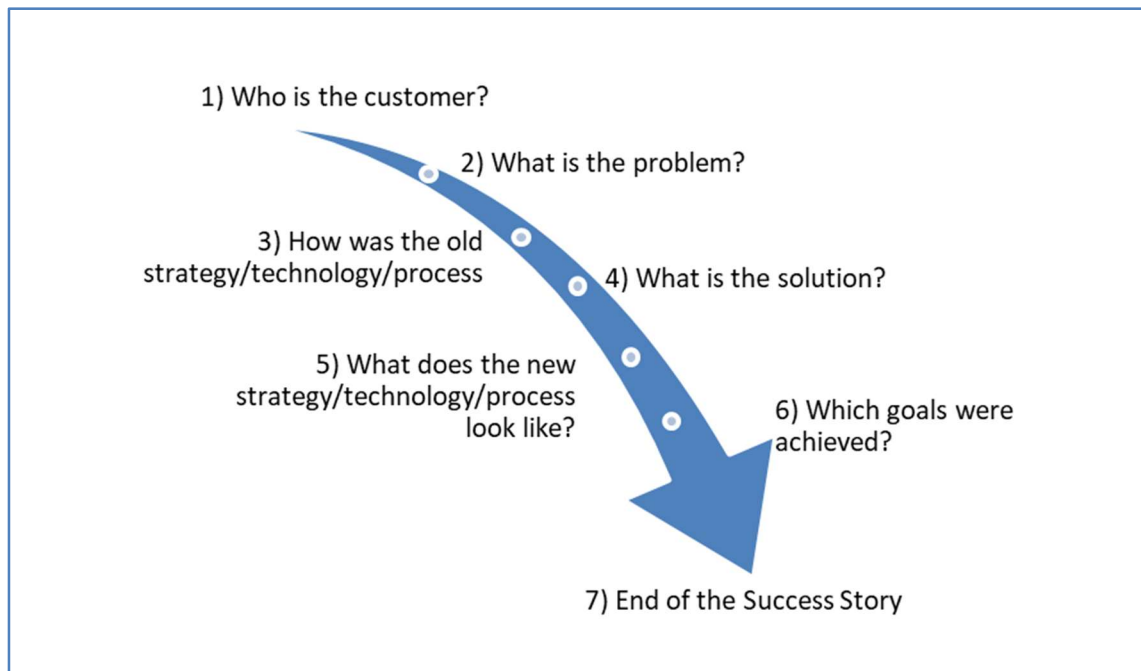6) Which goals were achieved?
7) End of the Success Story

Figure 2: Essential question to "Success Story"

4. Results

4.1. Template "Success Story" of the RTOs

The template is attached in Annex (6.1). The template is divided into 9 sections and allows the RTO to describe the "Success Story" within the KETGATE network in a consistent way. The aim is to offer the RTO's services to SMEs on the KETGATE website.

- **Section 1: First Page of the template**

The **first page** of the template contains the title of the "Success Story", the name of the RTO institute & KETGATE Business Advisor with the contact details of the Business Advisor, the name of the KET Facilitator and the current date.

- **Section 2 of the template: Overview of the "Success Story"**

Sections 2 of the template shows the **overview** of the "Success Story" with the main information:

  o KETGATE story code, title of the "Success Story", SME request code, project type (bilateral transnational project or joint transnational project with more than one RTO).
  o The main SME partner & contact person details (name, address & website of the SME and name, phone & email of the contact person).
  o The main RTO & the author of the "Success Story" with the contact details.
  o The KET technology.
  o The basic information of the project: duration & run time of the project & project costs.
  o Additional information for the Web designer.

- **Section 3: Picture**

This section contains meaningful **images** of the evaluated technology.

- **Section 4: Description of the Customer**

This section contains the description of the **customer's organization** and the business activities with the past success for the customer. For more information, see the customer's homepage.

- **Section 5, 6, 7 & 8: Description of the "Success Story"**

The Challenge
This section describes the goals and needs of the customer. The background is well defined in the SME request.

The Theme
This section describes the solution offered for the customer`s needs. The most important information is well defined in the RTO offer.

The Keywords
This section contains the most important keywords of the provided KET technology.

The Solution
This section describes the solution worked out & the main advantages for the customer. The most important information is well defined in the RTO report.

- **Section 8: Description of the Marketing Results**

This section describes the main **marketing results**. The most important information is well defined in the customer satisfaction.

4.2. Examples of each RTO "Success Story"

As examples, two success stories from the pilot phase are attached in Annex (6.2 and 6.3). The validated template was used to describe these success stories. The aim was to determine the practicability and effectiveness of the template. An example of a design proposal for a "Success Story" can be found in Annex (6.4) to the basic information of the pilot project between JR and the company Rebeat Innovation GmbH.

1. RTO: JOANNEUM RESEARCH
   SME: Rebeat Innovation GmbH
   Title: Soft lithographic replication of laser textured surfaces

2. RTO: Jožef Stefan Institute
   SME: PARDAM, s.r.o.
   Title: Evaluation of antimicrobial activity of nanofibre based structures

5. Conclusions

The template **"Success Story"** is part of the draft toolbox to support RTOs in transnational SME servicing. The tool has been proposed to support RTOs to describe successful case studies carried out by the RTO. Each **"Success Story"** will be published on the KETGATE website to inform SMEs about the RTO key competences.

During the pilot phase the strengths & weaknesses of the template were investigated and discussed. The adapted template shows the implemented proposals. The modified template should help the members of the KETGATE network to create a clearly structured and a consistent website (with corporate identity design) as a suitable information platform for SME users and suppliers of innovative key enabling technologies across Europe.

The marketing documents of the RTOs can be supplemented by a short brochure about each **"Success Story"** as a PDF document. The template serves as a basis for highlighting the key expertise of the RTO and should be used when first contacting SMEs.