Partnering Profile Quality Guidelines

Version 1.1 - October 2023
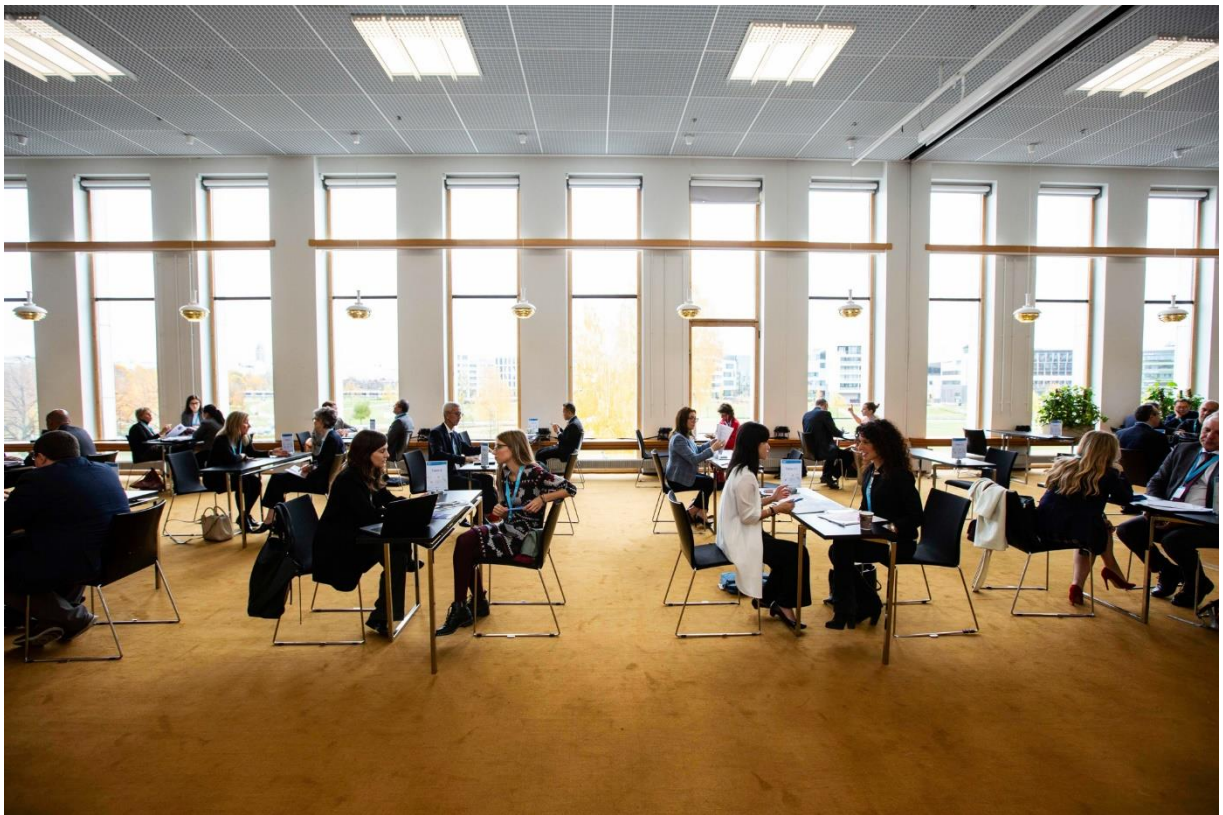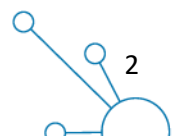
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1. Goal of the Guidelines

The aim of this document is to help Enterprise Europe Network (the Network) partners to draft and submit good quality partnering profiles in the new Partnering Opportunities Database (POD) launched in 2022.

These guidelines serve as a reference document for all profile creators, and they will help you to translate your client's cooperation needs into a clear and appealing profile. A well-written profile will generate greater interest from other companies and organisations about potential exchange of skills, services, products, or technologies with your client. In addition, it will reflect upon the quality of your work and of the Network.

If you are a Network newcomer, after first reading through sections 2 and 3, you should follow carefully the step-by-step approach described in Annex I when drafting your first POD profiles. Once the guidelines have been assimilated, more experienced profile creators may choose to work only with the checklists of required information by profile type available in Section 4.2. These lists provide an overview of the essential information that should be present in all profiles.

2. What to do BEFORE drafting a partnering (POD) profile

2.1. Background on the partnering process

The partnering process means the complete support provided by the Network to a client who has embarked on a Network journey with us and who is interested in cooperating internationally: from the identification of the client's needs to the completion of a partnering agreement. Whilst a variety of tools might be used to help the client find the right partner, the focus in these guidelines is on the use of the Partnering Opportunities Database (POD) of cooperation profiles. The POD is one of the Network's main partnering instruments.

A partnering profile is a cooperation request or offer. It summarises essential information about the nature of the client, the partner they are looking for and the expected cooperation. There are 5 profile types: Business Offers (BO), Business Requests (BR), Technology Offers (TO), Technology Requests (TR) and Research & Development Requests (RDR). See Annex I for further details.

Published cooperation profiles are visible to everyone in the world and are one of the key tools available to the Network to help clients to find the right partner for their international activity.

2.2. Who can and who cannot use the POD?

SMEs interested in growing their business through innovation and international activities are the Network's primary target audience and the main users of the POD. Profiles generally aim at achieving long term cooperation, but it is acknowledged that for certain technology transfer and license agreements, long term cooperation may not be envisaged.

Large businesses (non-SMEs) **can only publish Business Requests (BR) and Technology Requests (TR)** in the POD, provided the profiles would enable international activities for European SMEs. They are not entitled to publish Business Offers (BO) and Technology Offers (TO) and any offer profiles from such large businesses (non-SMEs) will be blocked and removed.

This restriction does not apply to universities and research centres, who may publish any type of profile.

Export consultants are also prohibited from using the POD to publish profiles.

2.3.   Which types of partnering profiles are not allowed?

- **Profiles for the direct sale of products and services** are not allowed.
- Profiles for clients **carrying out illegal activities or** dealing with **weapons** are not allowed**.**
- **Profiles containing any offensive language** are not allowed.

2.4.   Do the groundwork

Before starting to write a profile, profile creators are advised to follow these steps:

1. **Meet the client** (in your office, at their premises, via a virtual meeting) and **complete a needs assessment identifying the client's needs** and presenting EEN services that might meet those needs, including partnering services. The most important prerequisite for good profile writing is a sound knowledge of your client's needs. It is essential to find out about their specific objectives since internationalisation is not an aim but a vehicle to achieve their business targets.

2. **If there is a clear need / ambition to collaborate internationally, make sure that the client is fully committed** to finding a partner abroad and has the necessary resources and skills to do so. This can include having sufficient financial capacity to undertake international activities, good language skills and information on their products and services in the relevant foreign languages.

3. **Make sure that the client has developed realistic internationalisation strategies**, which can be pursued with the financial and personnel capacities at their disposal (see next page for further guidance). You should also analyse whether the proposed approach fits their corporate strategy, or whether it is missing from it, or indeed actually contradicts it.

Analysing your client's internationalisation strategy

Below are key elements to take into consideration when assessing your client's internationalisation strategy:

1) Geographic location:

   a. *Concentric approach strategy:* easier market access due to geographic proximity (neighbouring countries). This strategy is especially suited for start-ups and companies that haven't been involved in transnational activities yet.

   b. *Insular approach strategy:* related markets of specific interest. Market entry into respective markets (e.g. Scandinavia) will be planned and implemented in parallel. This approach ties up more resources but offers more business opportunities as well.

   c. *Selective approach strategy:* covering of markets with highest potential irrespective of geographical location (e.g. India and US). Requires in-depth know-how and sufficient management resources.

2) Timing of internationalisation:

   a. *First mover strategy:* the target market hasn't been covered by any competitor yet. It may represent a unique opportunity to access a market first, since standards can be set accordingly, and a customer base can be acquired. However, this strategy involves a lot of risks and is primarily advisable for well-experienced companies.

   b. Follower strategy: companies following competitors in a specific market can benefit from the experiences and established networks of first movers. However, they run the risk of never catching up with the head start of their competitors.

   c. Before companies decide on one strategy they are well advised to find out about their resources as well as their competitive advantage.

3) Competitive advantage:

   a. *Price leadership strategy:* while this strategy can be highly successful, it can be difficult to achieve on an everyday basis. It involves marketing a company as the cheapest source for a good or service. Therefore, costs must be minimized and savings have to be passed on to the customers.

   b. *Distinction strategy*: sometimes, a company can conquer a new market by making a product different rather than becoming a cost leader. In general, smaller firms try to compete with larger companies on differentiation rather than cost leadership.

2.5.   Register your client in the EEN Community

After establishing your client's needs and their internationalisation strategy, you need to create (draft) a **Client Card** which includes details of the company that has begun a Client Journey with the Network. You can do this by going to the **Clients** tile under the **Business** heading on the intranet homepage and choosing **Add Client**.

Remember to use a unique Tax Identifier Number for the company (no spaces or special characters allowed), rather than any company registration number. In most cases, the Tax Identifier Number will be the VAT number. For clients not registered for VAT, use another relevant Tax Identifier Number. Complete as many of the fields as possible. Do not include any personal data, such as personal email addresses.

If you need to ensure your client's anonymity, you can use an alias for the company's name and any identifier allowing you and your consortium colleagues to ensure each client is only entered once.

If you wish to involve your client in the drafting process, you will also need to create a **Contact Person** associated with that Client Card and the person will need to consent to their data being held (to comply with GDPR). Adding a Contact Person is not mandatory unless that person would like to be interactively involved in creating the POD profile (see section 3.1 below).

2.6.   Register the Action Plan

Once the client's partnering needs have been identified and evaluated, an **Action Plan** should be drawn up, agreed with the client, and registered against the Client Card in the EEN Community.

2.7.   Check the POD for existing profiles

The next step in the partnering process is to check in the partnering database if existing profile already match the client's needs. This can be done by clicking on the **Partnering Opportunities** tile (under the Business heading on the EEN advisor dashboard) and entering relevant search terms in the Search box at the top, or by using the available filters on the left-hand side.

If there are no existing opportunities that meet the client's needs, entering a profile in the POD on their behalf can be considered.

3. What you need to know about POD profile publication

3.1.   Profile Creation

The Network partner (the so-called "profile creator") drafts a **Cooperation Profile**, based on the cooperation needs identified with the client. A profile creator should only submit POD profiles on behalf of companies or research institutions located in the geographical area covered by their organisation. Please note that only a Hub (the Network partner that entered the Client Card into the EEN Community) can draft a POD profile for the client.

Creating a profile is a 2-stage process, with the first stage requiring general information, including linking the profile to the relevant Client Card, and the second stage involving giving more detailed information about the proposed collaboration and potential partners.

To create a profile, go through the following steps:

1. In the first section (**Profile Type & Ownership**), you need to select the profile type you want (BO, BR, TO, TR, RDR) and link the profile to an **owner** (an EEN advisor) and a **Client**.

2. Then, go through each of the sections carefully, entering the necessary information in each field and making sure that you've selected the right option from any drop-down menus

3. At the bottom of the first section, you can either **Save as draft** (you wish to continue working on the profile later) or **Continue** (to move to the second page).

4. On Page 2 - **Partner Sought and Dissemination**, you need to choose the relevant cooperation type (see Annex II of these guidelines for help on this) and give details of the kind of partner sought and the proposed collaboration.

5. Once you are happy with the text and have checked it carefully both against these guidelines and for correct grammar/typing, you will have two options:

   a. To save and publish the profile immediately, validating it on behalf of the client (but please check first that they are happy for you to do this).

   b. To save it and send a link to the Contact Person at the company, for their comments or possible amendments. Once your client submits their proposed changes, you will be notified and will be able to accept (or reject) any suggested revisions before publication.

➢ You may also use **this tutorial video**: it describes the POD profile drafting process step-by-step.

IMPORTANT

Quality-check profiles BEFORE publication

To allow for faster publication, there is no quality review process before profile are published and disseminated to your Network colleagues, their clients, and made visible on many websites.

A good part of an Advisor's, and the Network's credibility rests on the quality of profiles: they are very visible and directly reach existing and potential clients, as well as stakeholders.

All consortia should establish a system to quality-check profiles before publication.

- It is therefore vitally important that **all profile creators follow these guidelines very carefully** and **take steps to ensure a high level of quality in all profiles they create**.
- **Ensure all draft profiles are quality-checked by an experienced colleague.**
- Use the Network effect: **contact Sector Group or Thematic Group experts** for advice**.**

Improve profiles AFTER publication

EEN colleagues can use their expertise to make constructive suggestions and give ideas about how a profile might be improved by using the comments function below each profile.

- **Profile creators are strongly encouraged to consider these inputs** and act upon them as appropriate.
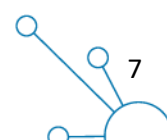
3.2.   Profile Dissemination

Once the profile is published, it is available for dissemination. This means that the profile may:

- appear in the results of searches carried out in POD by other Network partners looking to match their clients' profiles and/or interest;
- appear on the home page and in the search results carried out by visitors to the Enterprise Europe Network public website and the websites of Network partners;
- be disseminated via the automated profile queries that can be created by Network partners in POD for their clients;
- be disseminated by the Network partners to their clients via mailing lists, newsletters, and publications and/or through the automated publication of newly published POD profiles on their website, also by downloading them in PDF format.

3.3.   Expressions of interest

Once a Network partner has identified a potential cooperation partner who matches the requirements of a specific profile, they send (make) an **Expression of Interest** (EoI) to the Network partner who has entered the profile.

All Network partners deal with **incoming EoIs** (when a partner from abroad expresses interest in the profiles of their organisation) and **outgoing EoIs** (when they partner express interest in a foreign profile on behalf of a local client). If the client behind a profile and the one behind an EoI agree that their interests match, go to the next step: negotiations to reach a partnership with your support.

3.4.   Profile Renewal

Profiles remain published online for one year, except Research & Development profiles whose lifespan is determined during the profile creation according to the Deadline for the relevant call.

A profile has a maximum lifespan of 2 years. Once published for the first time, it is valid for 1 year. It will expire 365 calendar days after its first publication date. Two weeks before the expiry date, the profile creator will receive a notification that the profile will move to the status 'Expired' in 2 weeks. This automatic function ensures that all active profiles are up to date. Any user from the organisation managing the profile can extend its validity for up to 365 days following the rules below:

When the status is changed to Expired, the user has the option to extend the deadline or to archive.

Deadline extension rules:

- The profile must be currently published or have expired less than a year ago
- The deadline for a published profile can be extended at the earliest 30 days before its expiry
- The deadline can be extended only once for up to or for 365 calendar days
- The validity after extension starts from the expiration date regardless of when the profile is prolonged
- Once the deadline is extended, the profile will revert to the status it had upon expiration

After 2 years, the profile will be automatically archived.

3.5.   Managing profiles

The profile must remain active, which means you have to keep in touch with your client for updates. If a client is no longer interested in transnational cooperation, no longer reacts, or does not exist anymore, you should remove its profile from the POD. You can update and archive at any time once   published and delete unpublished (draft) profiles.

4. Drafting a good POD profile

How to write a good profile: general rules

The main information that needs to come across in any profile is as follows:

- What does your client do?
- What are they offering or requesting?
- What are they trying to achieve in terms of the prospective cooperation?
- What kind of partner(s) are they looking for?

To make sure that you create a good quality profile, please follow the following rules:

Keep it clear and concise

- Avoid long sentences or lists.
- Target the generalists/non-specialists and avoid jargon. Always bear in mind that it is often the Network partners who read the profiles first and disseminate them to their client companies as appropriate.
- Explain acronyms and abbreviations the first time you use them in the profile (except common ones such as DNA, SME, ICT/IT, OEM, ISO, GPS, NASA). If in doubt about whether it will be understood, spell it out.

Check spelling and grammar

- Run a spell check before submitting a profile
- Read the profile once more before submitting it.
- Avoid unnecessary use of capital letters

Make sure that the profile is consistent

- Always make sure that the type(s) of partnership selected corresponds to what has been stated in all the other fields.
- Generally, profiles should be anonymous to protect client confidentiality at this stage.
- However, your client can choose to waive this anonymity and to attach a corporate video to the profile if they wish. Please make sure that they are aware of any implications of doing this, including divulging corporate strategy to competitors, or risking unwanted approaches from companies wishing to act as suppliers etc.
- If your client wishes to remain anonymous, do not disclose their brand, trade names (either written in the profile or visible on attached pictures), any patent or certificate numbers. It would also be good to speak to an IPR Ambassador, to discuss any implications for IP protection if anonymity is waived.

Avoid repetitions

- I.e., copy – paste, especially in the title, summary, and description.
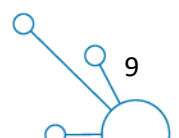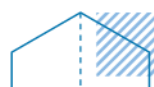
Avoid marketing speak

- the profile should remain factual and objective and not make unsubstantiated claims
- Write a profile in the third person (point of view). The use of "we, our, you, your" is not allowed.

5. Checklists of required information by profile type

The checklists below, by profile type, will help you check that you've included all the right information in the right place in your profile.

However, if you have any doubts about which is the right profile type to choose, or any questions about what information belongs where or how to write your profile, please refer to the detailed guidance given in Annex I and/or contact a more experience colleague.

5.1. Business OFFER

Field	Required Information
Title	✔ Product/service on offer ✔ Key cooperation type(s) – listing all cooperation types is not mandatory *TIP: the title should be concise and meaningful. It is recommended to include the country of origin.* *TIP: no typos, no abbreviations/acronyms, no brand/product names, no marketing speak or unnecessary capital letters.*
Short Summary	✔ Country of origin + field of activity ✔ Product/service on offer ✔ Selected cooperation type(s) *TIP: no typos, unexplained abbreviations/acronyms, brand/product names (if the profile is to be anonymous), marketing speak or unnecessary capital letters.* *TIP: no copy-paste of the title or 1st paragraph of the description.*

Full Description	✔ Country of origin + field of activity
	
	✔ Product/service on offer in more detail: main features and application fields of the product/service
	
	✔ Justification of the selected cooperation type
	
	    o WHY was this cooperation type selected? (What would be the desired outcome of an international partnership?)
	
	    o HOW is the international cooperation envisaged (Please explain fully the exact kind of cooperation envisaged by your client, don't simply re-state the broad cooperation type)
	
	TIP: no long lists; use short but complete sentences.
	
	TIP: add a picture (no brand names if the profile is to be anonymous).

Advantages & Innovations	✓ Advantages/innovativeness of the product/service, comparison with competitors ✓ Competitive advantages of the client. What makes your client stand out as a suitable partner? *TIP: avoid generalities (e.g. reasonable prices, high quality staff, unique, innovative, etc.), be specific (e.g. quantify amounts, certification standards, past international successes etc).*
Keywords	✓ Market keywords: Maximum 5
Partner sought	✓ Explain the desired partner's role, per cooperation type if relevant *TIP: avoid generalities (e.g. the partners should be reliable and professional; industry/company), be specific (would they work on commission? field of activity; experience etc…).*
Type of Partnership	✓ Select the most accurate *TIP: Make sure that the selected cooperation type(s) correspond to what is written in the summary, description and the partner sought fields.*

5.2. Business REQUEST

Field	Required Information
Title	✓ Product/service requested ✓ Key cooperation type(s) – listing all cooperation types is not mandatory *TIP: the title should be concise and meaningful. It is recommended to include the country of origin.* *TIP: no typos, no abbreviations/acronyms, no brand/product names, no marketing speak or unnecessary capital letters.*
Short Summary	✓ Country of origin + field of activity ✓ Product/service requested ✓ Selected cooperation type(s) *TIP: no typos, unexplained abbreviations/acronyms, brand/product names (if the profile is to be anonymous), marketing speak or unnecessary capital letters.* *TIP: no copy-paste of the title or 1st paragraph of the description.*
Full Description	✓ Country of origin + field of activity ✓ Product/service requested in more detail: main features and application fields of the product/service ✓ Justification of the selected cooperation type(s):

	o WHY was this cooperation type selected? (What would be the desired outcome of an international partnership?)
	o HOW is the international cooperation envisaged (Explain fully the exact kind of cooperation envisaged by your client, don't simply re-state the broad cooperation type)
	TIP: no long lists; use short but complete sentences.
	TIP: add a picture (no brand names if the profile is to be anonymous).
Technical specification or expertise sought	✓ Specific requirements needed by the client or from the potential partner *TIP: be specific (e.g. quantify any requirements, any certification standards required, expertise needed etc).*
Keywords	✓ Market keywords: Maximum 5
Partner sought	✓ Explain the role of the partner, per cooperation type if appropriate *TIP: avoid generalities (e.g. 'the partners should be reliable and professional'; 'industry/company'), be specific (e.g. field of activity; how many years of experience etc…).*
Type of Partnership	✓ Select the most accurate *TIP: Make sure that the selected cooperation type(s) correspond to what is written in the summary, description and the partner sought fields.*

5.3. Technology OFFER

Field	Required Information
Title	✓ Technology/know-how on offer *TIP: the title should be concise and meaningful, i.e. self-explanatory.* *TIP: no spelling errors, no abbreviations/acronyms, no brand/organisation names, no marketing speak or unnecessary capital letters.*
Short Summary	✓ Type of organisation + country of origin + field of activity ✓ Technology/know-how ✓ main advantage/innovativeness AND (potential) application field ✓ Selected cooperation type(s) *TIP: no typos, no unexplained abbreviations/acronyms, no brand/organisation names if the client wishes to remain anonymous, no marketing speak or unnecessary capital letters.*
Full Description	✓ Type of organisation + country of origin + field of activity

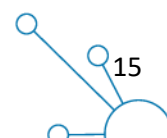|	✓ Set the scene:
	    o Outline the problem addressed by this technology
	    o Outline the state of art (e.g. existing technology solutions)
	✓ Main features of the technology and application field(s).
	✓ Justification of the selected cooperation type(s):
	    o WHY was this cooperation type selected? (What would be the desired outcome of an international partnership?)
	    o HOW is the international cooperation envisaged (The selected cooperation type should be explained further, not simply re-stated)
	TIP: the description should be understandable for a layperson.

Advantages & Innovations	✓ Innovativeness of the technology/specificity of the know-how in comparison with existing solution/competitors *TIP: avoid generalities (e.g. unique, innovative, etc.), be specific*
Stage of development	*TIP: the selected option should be consistent with the description and the selected cooperation type*
IPR status	*TIP: it is highly recommended to provide information regarding the key countries or territories for which protection has been granted or applied in the IPR Notes field*
Keywords	✓ Technology keywords: Maximum 5 ✓ Market keywords: Maximum 5
Partner sought	✓ Explain the partner's expected role, per cooperation type if appropriate. *TIP: avoid generalities (e.g., 'partners should be reliable and professional'; 'industry/company'), be specific (what experience or expertise should they have?).*
Type of Partnership	✓ Select the most accurate *TIP: Make sure that the selected cooperation type(s) correspond to what is written in the summary, description and the partner sought fields.*

5.4. Technology REQUEST

Field	Required Information
Title	✓ Technology/know-how requested *TIP: the title should be concise and meaningful, i.e., self-explanatory.* *TIP: no spelling errors, no abbreviations/acronyms, no brand/organisation names, no marketing speak or unnecessary capital letters.*
Short Summary	✓ Type of organisation + country of origin + field of activity ✓ Technology/know-how needed and WHY (what do they want to develop/improve?) ✓ Selected cooperation type(s) *TIP: no typos, no unexplained abbreviations/acronyms, no brand/organisation names if the client wishes to remain anonymous, no marketing speak or unnecessary capital letters.*
Full Description	✓ Type of organisation + country of origin + field of activity ✓ Technology/know-how needed and WHY (what do they want to develop/improve?) in more detail ✓ Main features of the requested technology/know-how ✓ Justification of the selected cooperation type(s): o WHY was this cooperation type selected? (What would be the desired outcome of an international partnership?) o HOW is the international cooperation envisaged (The selected cooperation type should be explained further, not simply re-stated) *TIP: the description should be understandable for a layperson.*
Technical specification & knowhow	✓ Specific technical requirements/know-how from the potential partner *TIP: avoid generalities, be specific*
Keywords	✓ Technology keywords: Maximum 5 ✓ Market keywords: Maximum 5
Partner sought	✓ Explain the role of the partner, per cooperation type if appropriate *TIP: avoid generalities (e.g., the partners should be reliable and professional; industry/company), be specific (what experience or expertise should they have…?)*
Type of Partnership	✓ Select the most accurate *TIP: Make sure that the selected cooperation type(s) correspond to what is written in the summary, description and the partner sought fields.*

5.5. Research & Development REQUEST

Field	Required Information
Title	✓ Framework / funding programme ✓ Targeted type/role of partner *TIP: No spelling errors, no unnecessary capital letters, no unexplained acronyms, no name of the organisation.*
Short Summary	✓ Type of organisation + country of origin + field of activity coordinator/partner ✓ Concise description of the R&D project (i.e., objective) ✓ Programme call (e.g., Horizon Europe sub-programme, Eurostars, LIFE, etc.) ✓ Field of activity/expertise and role of the partner sought *TIP: no spelling errors, no unnecessary capital letters, no unexplained acronyms.*
Full Description	✓ Overview of the R&D project: the problem being addressed and what will be researched/ developed, why and with whom. ✓ Programme framework conditions. ✓ Indicate timescales: EOI deadline AND call deadline, project duration etc. ✓ Type and role of the partner: expected expertise or know-how. *TIP: the description should be understandable for a layperson.*
Keywords	✓ Technology keywords: Maximum 5 ✓ Market keywords: Maximum 5
Partner sought	✓ Type and Role of partner sought ✓ Type of Partnership = Research cooperation agreement.
Programme Call	✓ Framework Programme ✓ Call Name ✓ Evaluation Scheme ✓ Deadline for Call & EOIs

6. Annex I – Step-by-step guidance

6.1. Choosing the right profile type

There are 3 categories of profiles divided into 5 profile types. The 3 categories are: Business profiles, Technology profiles and Research profiles. For Business and Technology profiles can be offers or requests. For Research & Development profiles you can only write a request to find a partner for a particular European research project.

Business Profiles	Business Offer (BO)
	Business Request (BR)
Technology Profiles	Technology Offer (TO)
	Technology Request (TR)
Research Profiles	Research Request (RDR)

Here are some tips to help you decide on the right profile type:

Business vs. Technology profiles:

A technology profile is used when the client offers or requests an innovative technology or know-how, and a technology transfer will take place. A technology transfer can be best described as the successful application and/or adaptation of a technology developed in one organisation to meet the needs of one or more other organisations. The transferred technology shall be innovative for the recipient.

When the client needs partners to expand his/her business abroad, then a Business Offer or a Business Request needs to be written. Indicators for business profiles are:

- o Offering or requesting mainstream technologies or existing products;
- o Establishing a franchise in other countries of the Network;
- o Finding trade intermediaries or suppliers abroad or;
- o Establishing partnerships, which do not involve technology transfer.

Business Offer vs. Business Request

A Business Offer is needed when the client wants to offer their products or services on external markets.

A **Business Offer** should be submitted when:

- o The client is looking for trade intermediaries (distributors/agents/representatives) or franchise partners to distribute, represent or offer its products or services on external markets;

- The client offers its services on external markets through subcontracting, outsourcing, manufacturing agreement or joint venture;
- The client wants to sell shares of the company;
- The client has a project in mind and looks for investors or partners to collaborate with.
- Please ensure that the BO is aimed at mid- to long-term partnering opportunities. **Any proposal for direct sales of goods/services or search for clients /customers is not allowed**.
- Please do not submit profiles for consulting companies offering similar services in direct competition to those which the Network offers (e.g., export consultants). Their profiles will not be published.

You should submit a *Business Request* when:

- The client is requesting the services/products of another company;
- The client is looking for products to complement its existing product range which it can distribute or represent in its own country or other defined countries/territories;
- The client is interested in buying shares of another company;
- The client looks for new projects to invest in.

Technology offer versus Technology request

A Technology Offer is a description of a specific innovative technology, process, or specific knowhow which the client is willing to make available to a prospective partner.

A Technology Offer should not be:

- a general offer of expertise/capability
- a vehicle for direct sales of a product or a service

A Technology Request is a description of a technology, process or specific know-how which is required by the client and which they are willing to source from a prospective partner.

Research & Development Request

You should write a Research & Development Request (RDR) when:

- Your client wishes to find a partner to join a consortium for a research project under a specific call, funded by the European Union
- Your client wishes to find a partner for a specific bilateral call (non EU-funded), where at least one of the partners is based in an EU member state or in an SMP-signed country

Only project partners or coordinators already involved in a consortium and engaged in the preparation of the response to a call for proposals can use RDR profiles to search for partners. POD does not accommodate Research & Development Offer profiles. If a client wishes to offer their know-how, skills and/or technology with a view to joining a project's consortium, consider drafting a Technology Offer profile and selecting 'Research cooperation agreement' as one of the anticipated agreement types. However, as noted above, as it is important to describe a
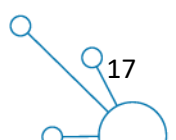
specific innovative technology or know-how when preparing a Technology Offer, so this option will not always be appropriate.

6.2.   Filling in your profile: field by field guidance

This section will give you an overview of the different fields you will come across when creating a new profile. It is organised based on the two sections of the profile form in POD: **General Information** and **Partner Sought and Dissemination**.

Each page hosts fields (title, summary, IPR status etc.) that require different pieces of information about the cooperation offer/request, the client, and the issuing Network partner. These fields will be explained one by one in this chapter.

Mandatory fields are identified next to the field's title/name in this guide and marked with an asterisk (*) in the POD itself. Mandatory may differ depending on the type of profile.

For each field, you will find

1. How the field should be completed in terms of information and style
2. Specific directions for each profile type: BO, BR, TO, TR and RDR.

6.2.1. General Information

The first page of the profile asks you to provide general information about your client and their cooperation requirements.

Profile Type - mandatory field

You will see the five options available. Choose the one which is most appropriate to the cooperation needs of your client (see Section 3.1.1 above for guidance). Your choice here will determine which fields appear subsequently in the form.

Profile Owner – mandatory field

This will usually be pre-populated with your own name, but if you wish to allocate the profile to a colleague, choose from the drop-downs available the person from your team who will be the owner of this profile and responsible for handling any EOIs and follow-up.

Client Company – mandatory field

Choose from the drop-downs available the name of the Client Company to whom the profile belongs. If you can't see the right name, you first need to create a Client Card for the client.

Profile Title – mandatory field

The title should be sufficiently meaningful to enable Network partners (and their clients) to decide whether to read further. It should be clear and concise, explicit and attractive, free from spelling mistakes and specific acronyms. Profile titles should not be entered with all the words in capital letters or with every word in the title starting with a capital letter.
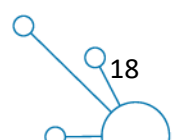
For ***Business Offers and Business Requests***:

The title should highlight the product/service on offer/requested and the key cooperation type desired. The client might be open to several types of partnerships. In this case, at least the main ('key') type of partnership should be mentioned. It is recommended to also include the country of location of your client.

For ***Technology Offers and Technology Requests***:

The title should be clear and self-explanatory for non-experts in the technology or application field. It should highlight the technology/know-how on offer or requested. Be careful not to make it too generic.

For ***Research & Development Request***:

The title should be clear and meaningful for non-experts in the technology or application field. It should make the reader understand in one glance what kind of partner the client is looking for. The funding programme applied for should be mentioned (e.g., Horizon Europe, Eurostars, ERDF-supported programmes etc.). It is not necessary to indicate the full name of the funding call/application in the title: this will be detailed in the profile.

Short Summary - mandatory field

This field is read immediately after the title and constitutes the basis on which the reader forms an opinion. It should be clear, concise, attractive and free of spelling errors, typos and unexplained acronyms (but you can include commonly used acronyms which do not need an explanation (such as DNA, SME, ICT/IT, OEM, ISO, GPS, NASA). Within the limited space (500 characters), it should summarize the main information contained in the profile. The summary should never be a copy-paste of the title or of the description's first paragraph. If only a few countries are targeted, it is good idea to mention it in the summary.

GOOD TO KNOW: TITLE and SUMMARY can be the only parts of a profile clients see at first.

Many Network partners only disseminate the titles and summaries of profiles to their clients as a first step, to save time and avoid an overflow of non-relevant information.

Only if clients are drawn by the information in the title and summary, will they ask for the full profile details. The title and summary should therefore provide a clear and complete overview of the entire profile and it is worth spending some time to get these sections right.

---

*For **Business Offers and Business Requests**:*

A good summary should contain the following information:

- ○ **About the client:**

  Where is the client from? (Country of origin)

  What is the sector activity of the client?

- ○ **About the products:**

  What products/services are the client offering/requesting?

  What will the products/services be used for?

- ○ **About the cooperation types:**

  What type(s) of partnership is/are considered?

If you have space, it is also good practice to provide a small overview of the advantages and innovations of the product/services offered/requested; these will then be fully discussed later in the Advantages and Innovations field.

*For **Technology Offers**:*

A good summary should contain the following information:

- ○ **About the client:**

  Where is the client from? (Country of origin)

  What kind of organisation is offering the technology (university/company/research institution)?

  What is the activity field of the client?

- ○ **About the technology:**

  What is the innovative technology?

  What can the technology be used for?

  What is the main advantage/innovation of the technology?

  What is the stage of development of the technology? (If relevant)

- ○ **About the cooperation types:**

  What type of partnership(s) is/are sought?

*For **Technology Requests**:*

A good summary should contain the following information:

- ○ **About the client:**

  Where is the client from? (Country of origin)

  What kind of organisation is requesting the technology?

  What is the activity field of the client?

o **About the technology:**

What is the technology being sought?

What are the key requirements for the technology being sought?

What will the technology be used for?

What stage of development is required for the technology being sought? (If relevant)

o **About the cooperation types:**

What type of deal(s)/partnership(s) is/are sought?

For **_Research & Development Requests_**:

A good summary should contain the following pieces of information:

o **About the project coordinator/partner:**

Where (geographically) is the project coordinator/partner from?

What kind of organisation is the coordinator/partner?

o **About the project:**

What is the R&D project about? What is the objective?

o **About the partnership:**

What should be the field/technology/research area/expertise of the potential partner?

What type(s) of partnerships is/are sought? What will be the role of the partner?

o **About the programme:**

Under which funding programme will the project be submitted? (E.g. Horizon Europe sub-programme X or Y, Eurostars, LIFE, etc.)

Full Description - mandatory field

The description should be perceived as a full stand-alone text, not a continuation of the short summary. Here you can describe the company, products and services and cooperation in more detail. Your text in the description should give enough details to help a potential partner decide whether to make an EoI.

A good description gives a clear outline of the client's background, what they do and what they offer or request and especially clarifies why and how international cooperation is envisaged. The description should be well structured and written in full sentences.

Tip: Attach a picture or drawing or a video to illustrate what is outlined in the description field is a really good idea. You can do this on page 2 of the profile form. You can upload .jpg, .jpeg and .gif. You can also attach a link to a video (see section 3.3.3 for details).

If you wish the client behind the profile to remain anonymous, make sure that the brand names / company's name are not visible on the picture or video or in the title of the uploaded file.

For *__Business Offers and Business Requests__*:

A good description should contain the following pieces of information:

- o **The client and its background:**

  The country of origin

  The field of activity of the client

  The specific expertise or know-how of the client

  Any additional information you deem relevant, such as a short company history, its position in the market, its previous experience with international cooperation, etc.

- o **The product or service on offer/requested:**

  Indicate clearly what the product or service on offer/requested is; give a clear description including the main features and application fields. Provide quantitative data and an illustration (picture/drawing…) if possible. If you intend to list products or services, make sure the list is easy to read by focusing on the relevant ones and by using bullet points.

- o **The desired partnerships:**

  The selected type of cooperation (selected in the field 'Types of Partnership', see below) should be explained, not simply stated. For example, where you have chosen "commercial agreement", you should try to give more details on the specific type of commercial collaboration your client is seeking (e.g., distributors, agents, franchisees etc). Try to explain for each requested cooperation type:

  Why was this cooperation type selected? What would be the desired outcome of the international partnership? It is helpful for potential partners if you can be as specific as possible and try to avoid general statements such as "The client is seeking a distributor to open new markets" or "The company is looking for an agent to sell more".

  How is the international cooperation envisaged? Explain how the client sees the long-term commitment and the practical organisation of the cooperation. This can typically include information on the sectors or industries targeted, or other relevant details of the cooperation.

For *__Technology Offers__*:

A good description should contain the following pieces of information:

- o **The client and its background:**

  The country of origin

  The field of activity of the client

  The specific expertise or know-how of the client

  Any additional information you deem relevant, such as a short company history, its position in the market, its previous experiences with international cooperation, etc.

- o **The technology on offer:**

    Set the scene: describe the problem that this technology will address and outline the 'state of the art' (i.e., the existing technology solutions and approaches to this problem).

    Describe the technology offered: indicate clearly what the use would be (application fields) and its main features and technical aspects. Provide quantitative data and pictures if possible.

    Indicate the innovative aspects. Keep in mind that there is a specific field for advantages and innovations, so, to avoid repetition, only highlight the main innovative aspects that you can later elaborate on.

- o **The desired cooperation type:**

    The selected type of partnership (selected in the field 'Types of Partnership', see below) should be explained, not simply stated. So, for a "technical agreement", outline what kind of technical collaboration is being offered. Try to explain for each requested type:

    Why was this partnership type selected? What would be the desired outcome of the international partnership?

    How is the international cooperation envisaged? Be specific about the exact type of collaboration sought. Explain how the client sees the long-term commitment and the practical organisation of the cooperation.

*For **Technology Requests**:*

A good description should contain the following information:

- o **The client and its background:**

    The country of origin

    The field of activity of the client

    The specific expertise or know-how of the client

    Any additional information you deem relevant, such as a short company history, its position in the market, its previous experiences with international cooperation, etc.

- o **The technology requested:**

    Explain why the client is looking for a specific technology. What do they want to develop/improve (e.g., improvement of the efficiency of a process, broadening the range of products, specific problem encountered …)?

    Describe the key requirements for the technology sought: try to indicate clearly what the use would be and which main features and/or innovative aspects it should have. Keep in mind that there is a specific field for technical specification and expertise.

- **The desired partnerships:**

  The selected type of cooperation (selected in the field 'Types of Partnership', see below) should be explained, not simply stated. Be specific about the exact type of collaboration sought. Try to explain for each requested cooperation type:

  Why was this partnership type selected? What would be the desired outcome of the international cooperation?

  How is the international cooperation envisaged? Explain how the client sees the long-term commitment and the practical organisation of the cooperation. Where possible, explain how the cooperation will be financed.

*For **Research & Development Requests**:*

A good description should contain the following pieces of information:

- **The project:**

  Set the scene. Provide an introductory overview of the domain in which the R&D project is embedded and for what the results will be useful.

  Explain the context: describe the project's aims and the issue to be tackled: what will be researched/developed, why and with whom?

  Provide scientific/technological explanation, while keeping in mind that the profile should be understandable to a layperson.

- **The programme:**

  Give the full name and information about the funding programme. Provide the programme framework conditions.

- **The partnership:**

  Provide information about the expertise/know-how of the organisation(s) already included/foreseen in the consortium.

  Indicate the type, size, expertise/capabilities and roles of the requested partners and where they should be based (if relevant).

- **Timescales:**

  Official deadline for the call

  Deadline for the EoI

  Anticipated duration of the project

Advantages and Innovation – mandatory field for BO and TO

This field is where you can convince the readers why they should work with your client.

Be as specific as possible without disclosing any information likely to reveal the client's identity, if they wish to remain anonymous. Avoid generic information such as "highly skilled workers", "competitive prices", "customised products", "quality products", "reliable" etc.
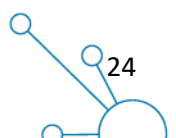
For ***Business Offers***:

- When offering services, mention elements such as experience in the sector, knowledge of the market, long lasting existence, innovative distribution services, reliability, information about the sales force, commercial networks….
- Benchmark the products or services in comparison to the competition
- If the products' price is lower in comparison to existing products in the market, then an explanation needs to be given (e.g., wood construction is 20% cheaper than steel construction)
- For products: consider mentioning elements such as performance, ease of use. Indicate if there is a potential for the product to cross-over into other industry sectors/markets.
- Back up the information with quantitative data if possible (e.g., thirty years' experience in the market).

For ***Technology Offers***:

- Explain the advantages and/or innovations mentioned in the description field in more detail.
- Explain how the technology offered compares to other prevailing technologies (while avoiding generalities such as "best" or "unique")
- Back up the information with quantitative data if possible

For ***Research & Development Requests***:

Despite this field not being mandatory for RDR profiles, it might be a good idea to indicate the potential impact the R&D project may have, e.g., on society, on the market, on the environment. If possible, provide qualitative and quantitative arguments.

Technical specification or Expertise sought - mandatory field for BR and TR

This field allows you to explain in more detail which main features and/or innovative aspects the required technology/product/service should have.

For ***Business Requests***:

 The required product and/or service should be described in more detail.

- What are the products/services the client believes could be suitable? In addition, what are the products/services the client is sure are not suitable?
- Are there some specific requirements to take into consideration (temperature, pressure, size, etc.)?
- Clearly indicate any technical requirements of the products/services requested and/or the technical competencies of the partner sought
- Again, try to be as specific as possible, to avoid EoIs from firms offering unsuitable products or expertise
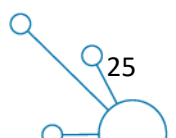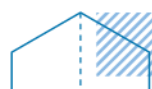
*For **Technology Requests**:*

Describe the required technology in more detail. Indicate what kind of technology is needed and what is not needed, for example in terms of:

- o Performance, ease of use, cost, quality
- o Size, dimensions, tolerances
- o Numbers/volume
- o Capability
- o Specific IP requirements
- o Stage of development required

Find a balanced approach: Do not be too prescriptive which might limit the EoIs, but still give enough specifications to get relevant offers. A combination of text and bullet points is often used.

Stage of development - mandatory field for TO

*For **Technology Offers**:*

Select the most appropriate stage from the drop-down list. There are five options:

- o Concept stage
- o Under development
- o Lab tested
- o Available for demonstration
- o Already on the market

*For **Technology Requests**:*

This field is not mandatory for Technology Requests. However, it can add value to the profile if you can indicate whether the client requires the technology to be at a specific stage of development (if not already described in the 'Technical Specifications or expertise sought' field).

*IPR Status - mandatory field for TO*

*For **Technology Offers**:*

Select the most appropriate option(s) from the drop-down list:

- o No IPR applied
- o Secret know-how
- o IPR applied but not yet granted
- o IPR granted

*For **Technology Requests**:*

This field is not mandatory for Technology Requests. However, it might add value to the profile to indicate here if your client requires a specific level of IP protection for the technology sought (and to describe this in more detail in the 'Technical Specifications or expertise sought' field).

IPR Notes
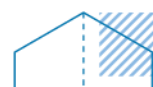
If you choose the options 'IPR granted" or IPR applied but not yet granted', this additional field will appear, to allow you to provide some additional information about the IPR status. For example, it is a good idea to explain what IP your client has / has applied for and any geographical coverage. For example, this could be along the following lines (as appropriate):

"Numerous patents have been filed and/or granted for this technology, in several territories and countries including Europe, Australia, China and the USA."

Please do not disclose the patent, design or trademark number, if you wish the profile to remain anonymous.

Sustainable Development Goals – mandatory field

Please indicate here to which of the UN Sustainable Development Goals your profile relates, by choosing from the available dropdowns:

- Goal 1:   No Poverty
- Goal 2:   Zero Hunger
- Goal 3:   Good Health and Well-being
- Goal 4:   Quality Education
- Goal 5:   Gender Equality
- Goal 6:   Clean Water and Sanitation
- Goal 7:   Affordable and Clean Energy
- Goal 8:   Decent Work and Economic Growth
- Goal 9:   Industry, Innovation and Infrastructure
- Goal 10:   Reduced Inequality
- Goal 11:   Sustainable Cities and Communities
- Goal 12:   Responsible Consumption and Production
- Goal 13:   Climate Action
- Goal 14:   Life Below Water
- Goal 15:   Life on Land
- Goal 16:   Peace and Justice, Strong Institutions
- Goal 17:   Partnerships to achieve the Goal

Note: if none are appropriate, please choose Not Relevant

At this point in the process, you can either click on Continue, to proceed to the second page of the profile form or you can click Save as Draft and return to it later.

6.2.2. Partner Sought and Dissemination

In the second section of the profile, you are required to give more details about the kind of partner(s) your client is looking for and to give information which will help to make sure it is disseminated appropriately.

Partner sought

Expected role of the partner - mandatory field

This field is mandatory and very important. Giving specific details about the partner sought and their expected role will help other Network partners to address the right companies in their regions and create relevant EoIs.

Please describe clearly what the partner will be expected to do (e.g., co-development of new drug, distribute your client's new innovative food product or work as a designer under a subcontract agreement). It is vital that you make sure this field is coherent with the selected cooperation types under 'Type of Partnership' (see below).

Type of partnership - mandatory field

Indicate in this field the type of partnership that your client is interested in. You can select more than one type if appropriate, but it is recommended that no more than 1-3 are chosen, otherwise the partner search will seem very unfocused.

The selected partnership type(s) in this field should be mentioned in the summary and described/clarified in the description field. Definitions for each cooperation type per profile type can be found in Annex II and as these options are quite generic now, it is **very important** that you check this Annex and understand what types of cooperation belong under each heading.

For _Business Offers and Requests_, you can choose from the following list of cooperation types.

- o   Commercial agreement
- o   Investment agreement
- o   Outsourcing agreement
- o   Supplier agreement

For _Technology Offers and Requests_, you can choose from the following list of cooperation types:

- o   Investment agreement
- o   Commercial agreement with technical assistance
- o   Research & development cooperation agreement

For a _Research & Development Request_, 'Research & development cooperation agreement' is the only cooperation type you can select.

Type and size of partner – mandatory field

Select the desired type and size of the organisation(s) that the client would like to cooperate with. This should be in line with all other statements made in the profile. Always pay attention to coherence. You can choose more than one, if appropriate.
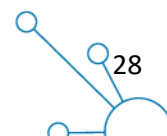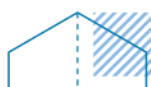
Call Details (RDR profiles only)

Framework Program – mandatory field

Choose from the available options to indicate under which of the Horizon Europe framework programs your client is preparing a project submission.

Call title and identifier – mandatory field

Please give here the title of the call under which the research project is to be submitted, together with its identifying number.

Submission and evaluation scheme

Please provide any relevant information for future partners about the submission and/or evaluation scheme of the call. For example, in Horizon Europe, the following types of submission schemes exist:

- Single-stage submission scheme
- Two-stage submission scheme:

In this case, the applicant must submit a 'short outline proposal' for the first stage and he/she will be invited to submit a 'full proposal' for the second stage if it passes the first-stage evaluation. In the profile, please indicate at which exact submission step the proposal is.

- Continuous submission scheme:

In this case, the call will set intermediate or final closure dates (cut-off dates) and specify whether the evaluation of proposals will be carried out within one month of that date. Proposals will be evaluated individually as they arrive and ranked after the next intermediate or final closure date. The cut-off date should be indicated in the "call deadline" field.

- Multiple-step submission scheme:

In this case, the submission may involve more than two-stages. You should thus indicate at which exact submission step the proposal is and which steps remain to be completed.

Anticipated project budget

Include an indication of the size of the budget anticipated for the project and the currency.

Coordinator required – mandatory field

Indicate (Yes/No) whether a coordinator is sought.

Deadline for EOIs – mandatory field

Choose a deadline for any EOIs. Make sure that you leave sufficient time between this deadline and the deadline for the call (see below), to give the partners time to complete preparation of their bid.

Deadline for Call - mandatory field

Choose the deadline for your call. After this date, the request will no longer be subject to offers.

Project duration in weeks

Enter the duration of the project in week(s).

Web link to the call

If applicable, insert a link to a website which would provide information about the call.

Project title and acronym

Enter the project title if known and any corresponding acronyms.

Dissemination

Market keywords - mandatory field

Choose a maximum of five market keywords applicable to the application of the services/product/technology/know-how.

- o Level three keywords are available to select (they are the most specific). Where a category has only two levels, a level two keyword can be selected.
- o Be aware that a search may be conducted using keywords alone.
- o Focus on market application(s).

Technology keywords - mandatory field for TO and TR

Choose a maximum of five technology keywords applicable to the technology.

- o Level three keywords are available to select (they are the most specific). Where a category has only two levels, a level two keyword can be selected.
- o Be aware that a search may be conducted using keywords alone.
- o Focus on the technology itself, not on its market application(s).

These keywords can also be used for BO/BR if you feel that they add value to the profile, but please make sure that they are relevant to your client's business.

Target countries

It may be necessary to restrict the dissemination of the profile to certain countries, subject to the needs of your client. In this field, you should enter the countries where you wish to disseminate the profile. Please ensure that the countries selected in this list do not contradict other fields of the profile. Do not include your own country in the list, as the focus of the profile should be on international cooperation. Unless you choose otherwise, the default option will mean that the profile will be disseminated to all EEN countries.

If you decide to restrict the dissemination of your profile to one or just a few countries, it's a good idea to mention them in the summary.
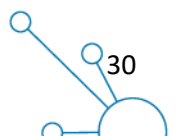
Sector Groups involved

You can indicate here which EEN sector group(s) the profile may be interesting for. Do not just choose any group to which you or your organisation happens to belong: this field should only be completed if there is a sector group which is relevant to your profile.

Media

It is possible to add attachments such as images and video to support a profile. This can be useful to describe complex products/services/technologies to allow non-specialists to understand a concept.

Keep in mind that the images uploaded should not reveal company/product names or brand names if your client does not want their identity to be divulged. In this case, the file name of the attachment should also not reveal any company/product or brand name because the file name is displayed as the title of the image on the published profile.

There is no limit to the number of files that can be uploaded in POD. However, each file cannot exceed 4Mb. The following formats can be used for images: .jpg, .jpeg and .gif. For a video, you will need to provide a URL for the site on which it can be accessed, as well as the video title.

7. Annex II: Definitions of partnership types

7.1.   Business profiles

OFFER	REQUEST
Commercial Agreement: a business agreement whereby two or more parties agree to collaborate in the buying/selling of goods or services on a medium- to long-term basis	
Your client is looking: ✓ for an agent to represent its products or services (based on a commission or retainer) ✓ for a distributor to sell its products ✓ to offer its trademark or process to potential franchisees ✓ for partners for whom it could act as a subcontractor ✓ Your client is offering a licence/ looking for licensees	Your client is looking: ✓ to act as the commercial agent for another company's products or services ✓ to act as a distributor for another company's products ✓ to take on a new product or service under a franchise ✓ to find new subcontractors ✓ Your client is looking to buy a licence.
Investment Agreement: agreement whereby one party agrees to invest in the other party's business or project. It can take the form of a loan, an acquisition of part, or all, of one party's shares, or another form of capital investment. It may also take the form of a joint venture, whereby two or more parties agree to set up a new joint business venture (note that a joint venture is not simply an agreement to work together on a project).	
Your client is: ✓ offering the company, or shares of the company, for sale ✓ looking for investors/investments in their company/project ✓ looking for a partner with supplementary skills/resources to set up a new legal entity	Your client wishes to: ✓ buy shares of another company ✓ invest in another company ✓ looking to join a partner, which has a specific project, in a new legal entity
Outsourcing agreement: an agreement between a company and a service provider in which a business process is contracted out to the service provider	
Your client is offering to perform a service (a business process) within the frame of an outsourcing contract. This could include manufacturing of certain products	Your client is looking for companies to which they could outsource part of their business process. This could include seeking a manufacturer of their products
Supplier agreement: an agreement between a company and a supplier, in which the latter is contracted to supply goods/services to the former on a long-term basis	
Your client is offering to provide supplies (e.g., raw materials)	Your client is looking to find new long-term suppliers (e.g., for raw materials)

7.2.   Technology profiles

Technology profiles should involve the transfer of know-how, technology, or expertise from a developer to a recipient. What is transferred may, for example, be the technology behind a process that enables the recipient to manufacture the product or implement a new process or system.

OFFER	REQUEST
Commercial Agreement with Technical Assistance: an agreement arranging the non-exclusive acquisition of a product/technology paired with the provision of several services in support of, or essential to, this transfer of technology.	
Your client ✓ has developed a product or technology and offers it for acquisition, on a non-exclusive basis, offering to support the transfer of the technology with the provision of additional support services ✓ offers a licence agreement / seeks licensee ✓ offers its innovative manufacturing services (involving some element of transfer of expertise, know-how, technology and/or training)	Your client ✓ is looking to purchase a technology/innovative product on a non-exclusive basis and requires additional services to support the transfer ✓ wants to buy a licence ✓ has developed an innovative product and it wants to have it manufactured ✓ requests manufacturing facilities with a specific production technology process
Investment Agreement: agreement whereby one party agrees to invest in the other party's business or project. It can take the form of a loan, an acquisition of part, or all, of one party's shares of or another form of capital investment. It may also take the form of a joint venture, whereby two or more parties agree to set up a new joint business venture (note that a joint venture is not simply an agreement to work together on a project).	
Your client has: ✓ an innovative project for the development of a product or technology, needs financing and offers the project to investors ✓ has a specific technological project, which requires a joint venture and is looking for a partner with supplementary skills/resources to set up a new legal entity.	Your client: ✓ is looking for technology projects for investment purposes ✓ is looking to join a partner, which has a specific technological project in a new legal entity
Research cooperation agreement: an agreement between two entities to work together on the exploratory research and development of a new solution or technology.	
Your client has started developing an innovative solution or technology and offers to a partner to pool R&D capacities.	Your client plans to start researching a new solution or technology and looks for a partner before starting the project.