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Abstract: The following document describes the objectives for the dissemination activities of the CoraPatents project, it presents the overall project dissemination strategy, explains some of the tools and techniques deployed to facilitate communication, and it introduces some of the activities that are planned.		



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# 1 Introduction

## 1.1 Summary

The following document describes the objectives for the dissemination activities of the CoraPatents project. It presents the overall project dissemination strategy, explains some of the tools and techniques deployed to facilitate communication, and introduces some of the activities that are planned. The dissemination plan describes objectives that should be reached with the information, thus reporting on news, events, project and R&D progress.

To reach the awareness level intended, dissemination will be supported by communication materials, such as a web-site, leaflets and posters. Important are also good, long-term relations to national and local media. In addition to this, project members will participate at conferences and workshops, and such activities will also be arranged within the project. A graphical identity will be created, with logo and templates for text documents and presentations.

## 1.2 Role of the deliverable

The purpose of this deliverable describing the CoraPatents dissemination plan is to:

- Identify dissemination objectives and goals,
- Define the content to be communicated,
- Identify key audiences for the project results and supporting efforts
- Choose the more appropriate communication tools to be used for the targeted audience.

This document has to be used as guide reference by each partner in driving the CoraPatents communication and dissemination activities.

## 1.3 Relationships with other deliverables and work packages

Deliverable D4.1 “Dissemination Plan”, is one of the main deliverables of WP4 “Dissemination and Exploitation Activities”. The deliverable aims at setting the foundations of the exploitation of results which will derive from the activities performed within the other work packages of the project. It aims to promote these activities and raise public awareness, and among the project partners through the use of different communication tools which are described later in this document.

## 1.4 Structure of this document

The following items are identified and deeply explained in this document:

- The objectives, the impact and the added value of dissemination for CoraPatents, the target groups and the approach to address them are described in section 2.
- The tools, the instruments and the rationale for their use, in section 3.
- The activities planned for Year 1 and for Year 2 in section 4.

## 2 The Dissemination in CoraPatents

The CoraPatents's goal is to build and establish the patent valuation methodology as accepted company assessment standard in the financial industry. Thus, the project aims at developing a proof-of-concept to verify that considering the value of patents a company holds will lead to more robust and reliable company ratings. This will be demonstrated through the development of a set of indicators combining monetary patent valuation with currency risk for globally operating companies and back testing their performance against classical valuation methods. A set of financial products based on these indicators will be the end result.

This chapter describes how the CoraPatents dissemination plan tries to reach and influences its audiences, i.e., stakeholders, general public or governmental organisations, on a long-term basis. So, it gives an idea about the strategic impacts of the dissemination policy on the target groups of CoraPatents. Thus, it is worth to first target the audiences to be reached by the dissemination policy of the project, and consequently to describe the objectives and the plan.

### 2.1 Groups and Information Flow

#### 2.1.1 *The Target Groups*

The CoraPatents consortium identified the main groups of targets susceptible to be interested in being informed about the activities and results developed within the project, namely.

- 1 **SMEs and Start-ups:** this target may be interested in the valuation reports as they can act as an important element when seeking for funding via loans and risk-capital.
- 2 **Rating Agencies / Venture Capital / Mergers & Acquisitions Companies:** these entities are viewed to be interested in the project's searchable database of valued patents.
- 3 **Asset Management Companies, Private Clients, Institutional Clients:** these actors are considered to be interested in the financial products (e.g. trading signals, products families) arising from the developments made within the CoraPatents project.
- 4 **Research Institutes / Research Organisations:** this target may be interested in the findings associated to the patent valuation methodology – proof of concept, as well as to the evolution of the financial markets facing this development.

The dissemination targets will be addressed through different approaches and tools.

### 2.2 Dissemination Objectives

The aim of Deliverable D4.1 “Dissemination Plan” is to promote the dissemination of the project results via two main lines of communication, namely (1) internal communication amongst the partners and (2) dissemination towards the main stakeholders of the financial sector.

The dissemination of the aims and both partial and final results of the project at various stages of realisation is one of the basic goals of the dissemination plan of CoraPatents. Dissemination includes both the dissemination to all relevant stakeholders in the European Union and in the financial sector and the communication among the project partners. The present document lists the dissemination actions in detail.

### 3 Disseminations instruments, tools and activities

The activities of raising public awareness are at the basis of project success. Several actions will be undertaken with such aim:

On-line actions:

- E-mail, e-newsletters, social media tools and the CoraPatents website will promote the project and its activities. Such activities will support the awareness creation on the CoraPatents space and will therefore support the exploitation of the project results. Finally, articles and press releases will be published in order to spread the information to a broad audience.

Off-line actions:

- The participation / attendance to relevant events and conferences, where it will be possible to establish synergies among important stakeholders, while collecting their feedback in order to ensure the CoraPatents outcomes / products fully addresses their needs.
- Organisation of events / meetings to present publicly the project results and showcases that illustrate the added-value of the CoraPatents developments.

#### 3.1 The CoraPatents Logo



**Figure 1: CoraPatents logo**

The building of the project's image started with the design of a distinctive logo. This logo will be included in the design and production of the CoraPatents website, leaflets, and posters, as well as in all the public and private communication material produced by the consortium.

#### 3.2 Project Promotion Material

##### 3.2.1 Brochure Design

A first CoraPatents brochure will be produced at the beginning of the project with general information about the project and the activities that will be developed within the project. It will provide information about the project as a whole, its objectives and expected results, and information about the consortium. This document will be available in electronic format and used as communication material to be sent by email to relevant stakeholders, to better explain the CoraPatents project aims and objectives. A printed version of this brochure will also be used in order to ensure the promotion of the project by all the partners when participating in events.

##### 3.2.2 Events catalogues

A set of catalogues will be produced during the lifespan of the projects, to illustrate the CoraPatents public events where the results and outcomes of the project are to be presented, aiming at

their future exploitation by relevant actors. These documents will be made available in electronic format and used as communication material to be sent by email to relevant stakeholders.

### 3.3 The Project Web-site

The CoraPatents website is the primary dissemination route through which the CoraPatents project will be presented, and will enable the automatic collection of contact details on interested stakeholders to be used for dissemination purposes (e.g., via e-newsletter, etc.). The idea is to keep all the sections of the website updated and to “animate” all the on-line activities, to be sure users return to the website at regular intervals.

The website is structured in 6 main areas:

- 1 **Homepage:** This section of the website contains a short description of the project, as well as a News section intended to notify visitors about recent events linked to the project (participation in events, publication of articles, etc.). Acknowledgements to the Eurostars Programme, the European Community, as well as relevant National entities will also be clearly visible.
- 2 **The Project:** This section of the website is divided into 4 sub-sections and aims at providing the public with specific and detailed information about the project itself:
  - Sub-section 1 (About CoraPatents): Sub-section created to provide a more detailed description of the project by explaining its purpose
  - Sub-section 2 (Partners): In this sub-section, the viewer can find a description of each partner integrating the CoraPatents consortium as well as a logo and a link to the partner’s webpage.
  - Sub-section 3 (Benefits): This sub-section describes the main goal and the sub-goals of the CoraPatents project.
  - Sub-section 4 (Public results): In this section the public can view the project deliverables and download the ones available to the public.
- 3 **CoraPatents Trials:** Section created to allow interested actors in accessing a trial to the database and to the developed financial models.
- 4 **Events & News:** This section of the webpage aims at providing information on the events during which the CoraPatents project will be presented, as well as it will offer the possibility to download the CoraPatents press releases and dissemination tools (e.g. brochure).
- 5 **Contacts:** This section will include an online form through which interested parties can reach the consortium and get more information about the activities and results.

### 3.4 Press releases

A minimum of four CoraPatents press releases will be developed throughout the duration of the project. Press releases will provide information about CoraPatents and the achievements of the project. Each will be uploaded in the public section of the website in the “News” section, as well as published on relevant magazines, such as:

- **Institutional Investor:** it publishes global research and issues rankings throughout the year that often serve as industry benchmarks [<https://www.institutionalinvestor.com/>]
- **Global Investor:** it provides a comprehensive coverage of the global markets, alongside exclusive industry surveys and research [<https://globalinvestorgroup.com>]

- **FONDS Professional:** Germany's independent magazine for investment advisors [<http://www.fondsprofessionell.de>]
- **Finanzwelt:** its a trade magazine for financial intermediaries [<http://finanzwelt.de/>]
- **€uro:** its a monthly business and investor magazine [<https://www.finanzen.net/euro/>]
- **Bloomberg:** is the biggest news provider and delivers business and markets news, data, and analysis. Content produced by *Bloomberg News* is disseminated through Bloomberg Terminals, Bloomberg Television, Bloomberg Radio, Bloomberg Businessweek, Bloomberg Markets, Bloomberg.com.

All CoraPatents partners will collaborate in the preparation of the press releases sending information to INOVA+ about news, success cases, etc.

### 3.5 Scientific publications

CoraPatents partners will be producing scientific articles on the developments and findings of the project to be submitted to relevant conferences and journals. Within the existing publications, the following are being targeted:

- Journal of Investment and Management;
- Science Journal of Business and Management;
- European Business & Management;
- Technology and Investment;
- Journal of Investment Strategies.

### 3.6 Twitter account

The CoraPatents consortium decided to create a Twitter account, which shall be launched within the first semester of the project. The objectives of this account - **@CoraPatents\_EU** - are to promote the project results and ongoing activities, as well as relevant news in the financial sector and patents market.

### 3.7 LinkedIn groups

The CoraPatents consortium decided to use the LinkedIn account of Intracom to promote the project results and ongoing activities, as well as relevant news in the financial sector and patents market in following groups:

**Table 1: LinkedIn Groups targeted by the project**

GROUP NAME	Followers
Algorithmic Traders Association: CTA & Quant Funds System Trading   Stocks, Futures, Forex, Options	177,985
Digital Asset Management	23,678
European IPR Helpdesk	1,705
Finance Director & CFO Forum (PortfolioFinanceDirector.com)	11,897
Front End of Innovation	57,214
Hedge Fund Group (HFG) Association: Alternative Investments, CTA Funds, & Fund of Funds	185,723

GROUP NAME	Followers
Hedge Fund Group   Alternative Investments, Fund of Funds, CTA Funds	21,352
IAM - Informing IP value	1,195
Intellectual Property Professionals	66,182
Intellectual Property Strategists	4,243
IP Intelligence	8,072
Licensing Executives Society International	14,049
Patent and Intellectual Property Practitioners	48,042
Patent Law Group	15,569
Patent Valuation	2,219
Patents	7,614
Patents - Intellectual Property	22,989
Silicon Valley Venture Community	22,742
Small & Micro Cap Funding Group: Investment Banking, Merchant Banking, Private Equity, Funds.	5,129
The Executive Club	59,517
The M&A Forum	27,479
Valuation	18,276
Venture Capital Patent and IP Strategy Group	2,631

### 3.8 Events

CoraPatents aims to take part in different events to aware its scopes, and to inform about the developments made within the project. A (non-exhaustive) list of potential events is reported below with the participation of one or more CoraPatents partners yet to be confirmed:

- “ALFI European Asset Management Conference 2018”, Luxembourg, LU. March 2018
- “Money 20/20 Europe”, Amsterdam, The Netherlands, May 2018
- “FT Investment Management Summit Europe”, London, UK, September 2018
- “Life Sciences IP Summit 2018”, Munich, DE. October 2018
- “European Winter Finance Conference”, 2019 & 2020

### 3.9 Meetings / Working Groups

Within the CoraPatents strategy for future use of the project results, a set of meetings will be planned with key actors in the financial sector that will generate working groups, as follows:

- Working group with the involvement of the EU Committee for Standardisation (EN) and the International Committee for Standardisation (ISO);
- Working group to engage development banks and other organisations related to Venture Capital and Merge & Acquisitions;
- Working group to involve wealth managers.

### 3.10 Collaboration Online

The CoraPatents consortium has decided to use and share a OneDrive folder, which shall act as the main repository of the project. This folder will enable partners to perform the following activities:

- To upload files, such as deliverables to be shared before being produced and realized,
- To upload files related to the participation in the various events,
- To facilitate the access of partners to the various documents of the project during the lifespan of CoraPatents,
- To allow partners to be aware of the main developments in the project (complemented with regular online meetings).

The folder is managed by JRC that will ensure regular back-ups to prevent any loss of information; all partners will be able to add and/or remove files to this folder.

## 4 Dissemination Planning

In the next section summarizing tables divided into two years are used to present the next steps regarding the dissemination of the project. The planning below is not static and will be updated with events the consortium decides to attend and new dissemination actions throughout the life of the project.

### 4.1 First year plan

The following two tables list an overview of the CoraPatents dissemination activities.

**Table 2: Action Plan Table (1st Year)**

<b>Name of Action</b>	<b>Type of Action</b>	<b>Planned/ Actual Date</b>	<b>Information to Disseminate</b>	<b>Partner Responsible/ Involved</b>
Logo	Implementation of the Project Logo	M2	Project communication tool	JRC
Word and PPT Templates	Design of project's templates	M6	Project communication tool	INOVA+
Website	Design and implementation of the website	M6	All information about the project, its ongoing activities, public deliverables	INOVA+
Twitter	Launch of the Twitter account	M6 (regular & continuous update)	Project communication tool	INOVA+
Brochure	Design of the brochure	M8	Generic information about the project expected outcome and actions	INOVA+
Press release 1	Preparation of the press release	September 2018	Project communication tool	INOVA+ / all partners
Articles / Papers	Publication of articles in relevant sector and scientific media	September to December 2018	Project achievements	All partners

## 4.2 Second year plan

**Table 3: Action Plan Table (2nd Year)**

<b>Name of Action</b>	<b>Type of Action</b>	<b>Planned/ Actual Date</b>	<b>Information to Disseminate</b>	<b>Partner Responsible/ Involved</b>
Press release 2	Preparation of the press release	February 2019	Project communication tool	INOVA+ / all partners
Articles / Papers	Publication of articles in relevant sector and scientific media	March to December 2019	Project achievements	All partners
Press release 3	Preparation of the press release	June 2019	Project communication tool	INOVA+ / all partners
Video	Creation of a video to explain the project	September 2019	Project Communication tool	INOVA+
Press release 4	Preparation of the press release	September 2019	Project communication tool	INOVA+ / all partners

## 5 Conclusions

The CoraPatents project dissemination plan is in good progress. The dissemination plan shows that quite a few activities are planned, and the partners will strive to meet the aspirations for disseminating the project progress and findings. Moreover, the dissemination plan will undergo changes in activities and time as the project progresses and new initiatives will have to be considered. The dissemination strategies, tools and activities will be reviewed throughout the project duration to support the emerging and evolving needs of the project.