



# Networking & Partnering

Rahel Kahlert & Christian Boehler



# Creating and maintaining a professional network

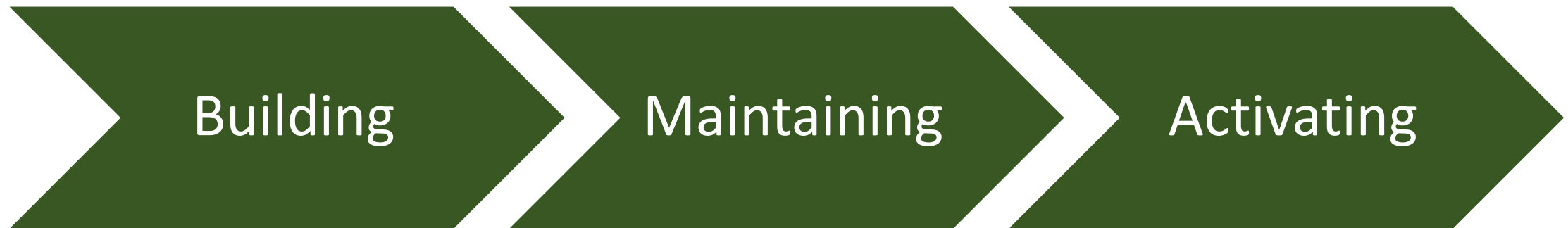


# Networking

- =act of making connections with other professionals and keeping it active through communication, with the intention of mutual professional benefits



# Stages of networking process



Source: Rajagopal, Brinke et al 2012





Anywhere:

- Conferences, professional development, trainings (e.g., Summer School): ask questions at end, mingle after
- Volunteer function (e.g., professional organizations)
- Social media (e.g., LinkedIn, ResearchGate)



# Networking exercise: elevator pitch

- 60 seconds
- Clear, concise, interesting, value-adding
- Points:
  - Who are you?
  - What do you do (that may interest the person)?
  - Why do you want to participate in the project?
  - Why should the project benefit from you?



## Exercise: elevator pitch rubric

	Yes	Partially	No
Clear	+	+/-	-
Concise	+	+/-	-
Interesting	+	+/-	-
Value-adding	+	+/-	-





- “One-hour project” (once a month, Trent Hamm)
- Personal: Follow-up via individualized email
- Social media (e.g., chat functions on professional networks)
- Meeting for drinks, lunch etc.







Purposeful reactivation:

- Partnering for a joint proposal for a call/grant/tender
- Need of expertise for a particular project



# Finding partners for collaborative research projects



# Agenda

- Identify call requirements with respect to collaboration
- Identify desirable partners for your project
- Check for potential knock-out criteria
- Build up your own consortium



# 1) Identify call requirements

## An Example:

### H2020 SwafS-13-2017: Integrating Society in Science and Innovation – An approach to co-creation

<http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/swafs-13-2017.html>

- *“To address this specific challenge, proposals should have a wide geographical coverage. It is therefore expected that consortia would include at least entities from **10 different Member States or Associated Countries**, although smaller consortia will also be eligible and may be selected.”*
- **Entities from which countries CAN participate in our consortium?**
  - EU-member countries (automatically eligible for funding!)
  - Overseas country or territory linked to an EU-country [Annex A \(overseas countries\)](#)
  - Associated countries (automatically eligible for funding!) [Associated countries](#)
  - Entities from developing countries [Annex A \(developing countries\)](#)
  - In exceptional circumstances, entities from industrialised or emerging economies if:
    - there is a bilateral agreement between that country and the EU
    - the country is explicitly identified in the relevant work programme and call for proposal as being eligible for funding
    - their participation is deemed by the European Commission to be essential for carrying out the action. (e.g. because of outstanding expertise, access to research infrastructure, access to particular geographical environments or access to data)



# 1) Identify call requirements

## An Example:

### H2020 SwafS-13-2017: Integrating Society in Science and Innovation – An approach to co-creation

<http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/swafs-13-2017.html>

- “To address this specific challenge, proposals should have a wide geographical coverage. It is therefore expected that consortia would include at least entities from **10 different Member States or Associated Countries**, although smaller consortia will also be eligible and may be selected.”
  - **Entities from which countries are NOT automatically eligible for funding?**
    - *Entities from industrialised or emerging economies, if neither of the above exceptions apply!*
    - *participants from these countries have themselves to determine the sources of funding and find the resources for their part of the action. Several countries have created mechanisms to co-fund their participants in Horizon 2020 actions selected for EU funding*
- So entities from these countries could still participate in your consortium, but they would have to find their own funding source for the project!
- [Funding manual](#)



# 1) Identify call requirements

## An Example:

### H2020 SwafS-13-2017: Integrating Society in Science and Innovation – An approach to co-creation

<http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/swafs-13-2017.html>

- *“To address this specific challenge, proposals should have a wide geographical coverage. It is therefore expected that consortia would include at least **entities** from 10 different Member States or Associated Countries, although smaller consortia will also be eligible and may be selected.”*
- **Which entities are eligible for funding?**
  - Standard eligibility conditions [Annex C](#)
- **Does your potential partner already have a PIC number?**
  - To participate in a H2020 proposal (or any other EC competition) your organisation needs to have a 9 digit “Personal Identification Code”
  - When searching for partners for a project, it is highly advised that you confirm right at start that the organisation has such a code, or will immediately start the application process
  - You can check whether an organisation is already registered, or apply for a PIC code [here](#)



# 1) Identify call requirements

## An Example:

### H2020 SwafS-13-2017: Integrating Society in Science and Innovation – An approach to co-creation

<http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/swafs-13-2017.html>

- *“To address this specific challenge, proposals should have a wide geographical coverage. It is therefore expected that consortia would include at least entities from 10 different Member States or Associated Countries, although smaller consortia will also be eligible and may be selected.”*
- **Finally, what is written in the „subtext“**
  - A wide geographical coverage probably means that the funding organisation expects cases, pilots etc. to be implemented in 10 countries at least (at least you should assume that other consortia interpret it this way!)
  - In practice, that means that you may end up with (considerably) more than 10 entities, as besides those responsible for implementation, you need partners in charge of development, evaluation and dissemination / exploitation of activities!
  - Also, even if the call states that smaller consortia may be eligible, always expect that you will be competing with other consortia who fully adhere to the specifications as set out in the call. So best to do it likewise.



## 2) desirable partners for your project

**After carefully considering what is expected by the funding organisation, you should start thinking about the best possible combination of**

**- Expertise / know how**

- Skills (technical, managerial, etc)
- Expertise of the topic
- Ability to perform relevant tasks within the consortium (e.g. conceptual work, developing a prototype, rolling out a pilot study, evaluating data / results, dissemination)
- Skill mix within the consortium (Rather than collaborating with a group of experts on the very same thing, aim for a multidisciplinary team that complements each other)

**- Experience**

- Experience of the partner with this kind of work
- Experience of the partner with previous projects of this kind / from this funding source
- But also YOUR experience of working with this partner (reliability, work ethic, quality, etc)

**- Added benefit for the proposal**

- E.g. reputation of the institution / individual researcher
- Access to critical resources (e.g. data, patients, users, technical equipment, etc.)

**- Existing networks within the consortium**

- It is always good to have existing links within the consortium. People who know each other collaborate much better and this is also something evaluators recognise!





# 3) Knock-out criteria

**Nothing is more frustrating than working together on a proposal and, soon before the submission is due, finding out that one (or more) partners are formally not eligible, or that there are other knock-out criteria!**

**So when partnering up, clarify as early as possible:**

- That each entity is fully eligible for participating in that call (geographically, legally, financially, etc. see previous slides!)
  - Some calls may restrict participation of certain entities (e.g. private / for-profit entities)
  - The coordinator may have to confirm (on behalf of all participants) that each entity has the financial and operational capacity to participate in the call
  - Some calls preclude participation of organisations that are „financially vulnerable“ and offer a self-check of financial viability  
<http://ec.europa.eu/research/participants/portal/desktop/en/organisations/lfv.html>
- That the person you are dealing with has the authority or approval to enter their organisation into the consortium
- That each partner gives his/her explicit (written) consent to participate in the consortium
- That each partner approves the final proposal document
- That each partner provides, as early as possible, any administrative information that needs to be submitted to the funding organisations



## 4) Build up your own consortium

### Now it is your turn!

- **We would like you to build up your own consortium.**
- **In order to do so, please pick at random one of the profiles from the hat and briefly study your role**
- **After that, your task as a group is to form 2 consortia, based on the assigned roles, considering the necessary skills and experience**
- **You may find yourself in a position where both consortia will try to bid for you so that you may have to decide who to work with (and can negotiate your terms)**
- **Likewise, it may be possible that you will have to raise your profile, actively approach the consortium and try to „pitch“ your strengths**
- **You have 20 Minutes for this task, and after that, we will briefly discuss the exercise**

