enterprise europe network

Profile Drafting Guidelines

Version 4.2

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Business Support on Your Doorstep

European Commission

TABLE OF CONTENTS

Document History and Version Control

Version	Publication date	Brief description
1.0	23 June 2014	Creation of original document – unification of the 5 existing guidelines for creating BO, BR, TO, TR, RDR
2.0	10 April 2015	Amendments in accordance with the spring SAG meeting and reflecting the needs, discussed at the ERs' and IRs' training in Brussels in March-April 2014
3.0	30 October 2015	• Amendment of the description of the External Reviewers' process in accordance with the latest update of the Network IT Platform - Switch to 1 External Reviewer per profile review - EASME performs external reviews in exceptional cases only - Explaining the outcome of the awarded scores by ERs • Adding explanation of the Internal Reviewers' outcome possibilities • Adding a set of criteria and explanation for becoming an ER • Amendment in the title of the 2nd scoring criterion • Amendment in the explanation for the expiry of profiles - 2 years after their initial publication • Alignment in the terminology and in accordance with the latest approved practices in the entire document
3.1	14 January 2016 (changes acc. to the request of the SAG, 11-12 Jan 16)	• Changing the criteria for becoming an External Reviewer (p.9) • Adding a timeframe of 30 days for validation a profile by the External Reviewers (p.7-8) • Prohibition of export consultants to use the POD for publishing profiles (p.12)
4.0	30 June 2016	Multiple changes based on WG-deliverables
4.1	29 November 2016	• Discontinuation of 30 day-rollover of pending profiles (p.8) • Conditions for becoming an External reviewer (p.10) • Opening RDR profile for non-EU-funded calls (p.19)
4.2	4 April 2017	• Change of the criteria for becoming an ER (p.10)

Acronyms & Abbreviations

COSME	Programme for the Competitiveness of Enterprises and Small and Medium-Sized Enterprises
DG GROW	Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
EASME	Executive Agency for Small- and Medium-Sized Enterprises
EC	European Commission
EEN	Enterprise Europe Network
EoI	Expression of Interest
ER	External Reviewer
EU	European Union
IR	Internal Reviewer
IT	Information Technology
PA	Partnership Agreement
POD	Partnering Opportunities Database
SAG	Steering and Advisory Group
SME	Small- and Medium-Sized Enterprises
TCP	Thematic Contact Point

1. Introduction and Scope

The aim of this document is to help Enterprise Europe Network partners to draft and submit profiles in the Partnering Opportunities Database. These guidelines should serve as a reference document for all partners entering profiles in the POD as well as for internal, external and EASME reviewers when checking the quality of profiles before publication.

1.1. Background on the partnering process

The partnering process begins with Network partners looking for clients that are interested in cooperating internationally. Once the partnering needs of the client have been identified and evaluated, the actual partnering process should begin by first checking the POD, to see if there are any profiles there which already match these needs. If this is not the case, then entering a profile in the POD through the Network's IT Platform can be considered. A profile is a cooperation request or offer. It summarises essential information about the nature of the offer or request, the client and the expected cooperation.

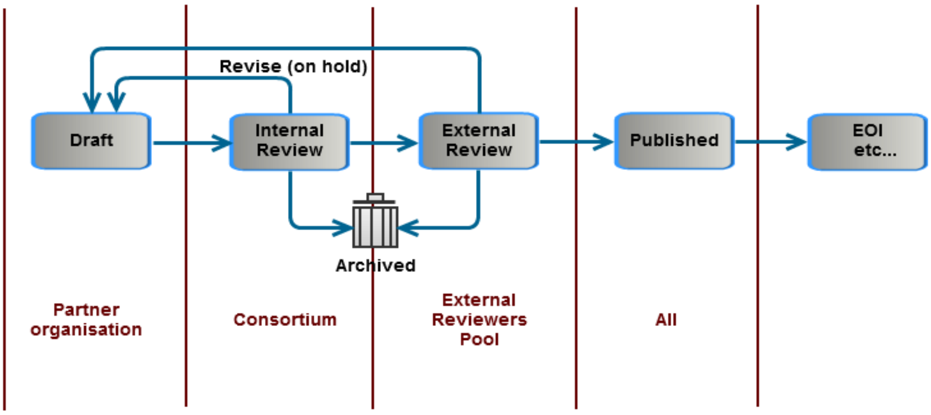
Published profiles are visible to everyone in the world and are one of the key tools available to the Network to help clients to find the right partner for their international activity. Once a Network partner has identified a potential cooperation partner, who matches the requirements of a specific profile, they send (make) an Expression of Interest 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 with outgoing EoIs (when the partner expresses interest in a profile on behalf of a local client). If the client behind the profile and the client behind the "EoI made" agree that their interests match, the partnership process moves to the next stage - negotiations and assistance to reach partnership.

For more information about the partnership process, please refer to the Guide to the Partnership Process[1].

[1] http://een.ec.europa.eu/my/intranet/guide-partnership-process

1.2. Background on the profiles publication process



Graph: Please note that this graphic gives an overview of the profile creation process and does not reflect the detail of the flow of notifications within the POD

The process starts with the creation (drafting) of a profile by a Network member, the so-called "profile creator", based on the cooperation needs which have already been established, ideally through a face-to-face business or technology review. The profile creator, after filling in the online form for the desired profile, has the following options:

- **Save and continue**: this enables the creator to make further changes on the profile2.
- **Submit Profile for Review**: the profile is submitted to internal reviewers and the system changes its status to Internal Review. At this point, the profile can no longer be edited by its creator.

Once the profile creator chooses to "Submit Profile for Review", the profile undergoes a two stage procedure before being published and disseminated. This procedure has been implemented in order to maintain a high level of quality in all profiles, on which a good part of the credibility of the Enterprise Europe Network rests.

There are two levels in the review process:

- **Internal review** by colleagues within the partner's organisation or other members of their consortium.
- **External review** by specialists in the Network, who have been assigned the role of external reviewer due to their experience and knowledge.

Both internal and external reviewers must apply these guidelines.

The EASME may also act as a reviewer. However, the EASME does not perform regular external review of POD.

[2] For how to write good POD profile, please refer to section 3 "Step-by-step Guidance" (p. 15)

1.2.1. Internal review

Once a draft profile has been finalised by its profile creator (i.e. once he or she clicks "Submit Profile"), the profile should be reviewed by an IR. Internal reviewers are Network staff members who have been assigned the role of reviewing draft profiles within their consortium. However, an IR cannot review his or her own profiles.

The IR checks whether the profile is in line with the present guidelines, checks the spelling and grammar and whether all the mandatory information is there. If some adjustments are needed, he or she clicks on “Revise” and adds comments in the designated comment box. In this case, the profile is sent back to the profile creator, who can edit the profile accordingly and resubmit it. Once the IR is satisfied with the profile, he or she clicks on the “Approve” button and the profile is sent to the pool of external reviewers.

It is the responsibility of the Internal Reviewer, to ensure that the profile fits the guidelines, and is correctly written and presented. The Internal Reviewer is the first quality control step in the validation process.

1.2.2. External Review

Once a profile is approved by an internal reviewer, it is passed on to the pool of external reviewers. The external review is the second step in the validation process and it determines whether a profile can be published or not in its current form.

When revising the profile, the profile creator will be expected to ensure that the profile complies fully with the POD drafting guidelines and with all requirements for POD creation. This should assure better chances for the profile to be reviewed by the external reviewers within the timeframe. When the profile is revised, the profile creators are invited to resubmit the profile for external review.

The external review process is based on four criteria. The ER can give between **0 and 5 points** for each of the following **criteria**[3]:

1. Clarity, coherence and understanding
2. Advantages and Innovation / Expertise Sought[4]
3. Guidelines and Linguistic accuracy
4. Cooperation expectations

Based on the total score, given by the ER, profiles receive the status:

[3] You can click on the ? icon left of the 4 criteria to learn how to review each criterion.

[4] In the case of Business Request and Technology Request profiles, this criterion is to be understood as relating to the description of the "Technical Specification" or "Expertise Sought".

Profile rating	Total score of the ER	Next step
Excellent	17 - 20	The profile is **published**.
Good	14- 16	
Sufficient	10 - 13	
Rather poor	5 - 9	The profile is put **on hold**: The system notifies the profile creator that the profile needs to be revised and changes its status to "**On hold by ER**" in the profile creator's dashboard. Comments from the external review will go to the profile creator and the internal reviewer will be informed. Once the profile creator revises the profile and resubmits it, the profile is directly placed for another external review (no second internal review is needed). The ER who conducted the first external review will receive an automated email that a profile is resubmitted and ready for revision. Nevertheless, the profile will be visible also to all ERs and it can be taken over by any ER for validation.
Insufficient	0 - 4	The profile is **rejected** and archived.

Blocking "0" scores

An external reviewer can give a "0" (zero) or a "blocking score" to one of the four above-mentioned criteria to indicate that the quality of the profile is being compromised by a certain issue (e.g. major spelling errors) or an inconsistency with the guidelines (e.g. brand name, patent number). This implies that the external reviewer considers that the profile should be corrected by the profile creator and should therefore be blocked / put on-hold. So it can happen that an external reviewer gives the profile a total rating of more than 10 points, but with a "0" for one criterion. If the ER gives a blocking score, then the profile is automatically put on hold and sent back to the profile creator.

Comments by Internal and External Reviewers

It is mandatory for all internal and external reviewers to write a comment regarding the quality of the reviewed profile and any recommendations for improving it. Even when a profile is considered good enough to be published, the internal and external reviewers often give constructive comments for the future improvement of the POD.

The ER can use the comments of the IR as a base for further analysis. The reverse process is useful for the IRs, who can use the comments of ERs to improve the quality of their reviews.

Re-Submitting profiles

Before re-submitting a profile for an update, improving after blocking or “on hold”, please make sure, that the comments made by IR and ER are taken into account and the profile meets criteria of the newest guidelines. Profile creators should take the comments carefully into consideration and implement the requested changes before resubmitting the profile. Any suggestions made by the reviewers that have not been taken into account should be explained in a comment. The comment box is a first step to get in contact with IR and ER.

Criteria for becoming an External Reviewer

Network partners can become ERs after they prove sufficient experience in working with the POD. The applicants will be evaluated by EASME based on their experience as profile creators and internal reviewers. EASME will take into consideration the scores given by the ERs for the profiles produced and internally reviewed by the applicants.

The participation at an external reviewers' training course remains mandatory for all applicants. However, training can be delivered by several sources: **i) local training by the TCPs, ii) decentralised training organised by the TCPs, iii) peer-to-peer coaching in cooperation with a TCP and an experienced ER, iv) centralised training by EASME**.

Applicants with **sufficient experience** as profile creators and internal reviewers will be approved by EASME to start their activity as ER immediately after their application. They will need to participate at an external reviewers' training course within a few months after their approval. Applicants with **insufficient experience** in the field will be requested to participate at any form of external reviewers' training before being approved as ER by EASME.

To apply to become an External Reviewer, interested partners can use this link[5].

After logging-in to the account, the applicant has to press "**Become an external reviewer**" button. The applicant will be prompted to write a motivation statement for becoming an ER. It is essential i) to prepare a well-justified motivation statement; ii) to explain how his or her experience in the Network is relevant to acting as an ER; iii) to demonstrate an ability to act as an ER for the Partnership opportunity database (POD).

Ideally, a candidate ER should have had 6 months of experience working as an IR within his / her organisation or consortium.

1.2.3. Publication and 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[6] and the websites of Network partners;
- be disseminated via the automated profile queries[7] that can be created by Network partners in POD and by clients via the Enterprise Europe Network public website or other websites using a widget;

[5] http://een.ec.europa.eu/tools/NEM/ExternalReviewer/MyStatus

[6] http://een.ec.europa.eu/tools/services/SearchCenter/Search/ProfileSimpleSearch?shid=32db25cb-726f-43b0-8b5f-7742d0935799

[7] http://een.ec.europa.eu/tools/CDM/Query/MyQueries

- 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.

For more information on the profile workflow and dissemination, please refer to the Network IT Platform Partner User Guide[8].

1.2.4. Expiry of published profiles

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

Two weeks before the expiry date (one year), the profile creator receives a notification by email that the profile will revert to Draft mode on its expiry date. This is an automatic function to ensure that all active profiles are up-to-date and provide accurate information to the Network.

When the status is changed to Draft, the profile creator has the following options:

- **Extending the profile's publication time** by updating and resubmitting the profile;

  When resubmitting a profile, the creator should check that all the information is still valid and up-to-date, making any necessary changes. When being republished, the profile does **not** need to go through full internal and external validation again. The only case when the entire validation starts again is when the cooperation type(s) are changed by the profile creator.

  It is possible to resubmit a previously published profile 2 times, for a period of 6 months each time. This makes the total maximum life of a profile 2 years (1 year after its initial publication + 6 months + 6 months). All profiles will be automatically archived after 2 years following their **first publication**, no matter what their status in the meantime.

- **Delete the profile**: the profile is archived and therefore it will only be visible to the partner organisation that created the profile.

1.2.5. 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. Profiles can be deleted and updated at any time when your profile is not under internal or external review.

1.3. Use of the present guidelines

Writing a profile is like writing a CV and a cover letter. If you really want your client to find a cooperation partner abroad then you should make an effort to write a good profile. These guidelines were created to help you translate your client's cooperation needs into a clear and appealing profile. A well written profile will generate greater interest from individuals and organisations with regards to

[8] http://een.ec.europa.eu/tools/Help/Master.html

potential exchange of skills, services, products or technologies. In addition, it will reflect upon the quality of your work and of the Network.

These guidelines serve as a reference document for all actors involved in the profile creation and review process, namely:

- Profile creators
- Internal reviewers
- External reviewers
- EASME

In order to ensure the smooth validation and rapid publication of their profile, it is in the profile creators' best interests to follow closely the guidance provided in this document and to understand the criteria upon which their profiles will be assessed by the reviewers. Similarly, it is important that all reviewers understand the guidance provided to profile creators, in order to ensure as consistent and fair approach as possible to the review process.

Newcomers in the Network are recommended to read these guidelines thoroughly and to follow carefully the step-by-step approach described in chapter 3 when entering their first profiles into the POD. Once the guidelines have been assimilated, more experienced profile creators may choose to work only with the check lists of required information by profile type available in Annex I. These lists provide a more succinct overview of the essential information that should be present in all profiles.

2. General tips and tricks

2.1. How to do the ground work

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

1. preferably meet the client (in your office, at their premises, via skype conference) and 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 ability to undertake international activities, good language skills and relevant language information on their products and services.
2. complete an intake assessment identifying the client's needs and presenting EEN services
3. check first in POD to see if there are existing profiles which are relevant and interesting for the client
4. present the opportunity to subscribe to the Partnering Opportunity Alert in order to receive profiles that can match their needs

Profile creators should not insert profiles when their clients are interested only in direct sale of products and services. Profiles are generally aimed at achieving long term cooperation[9]. Following the request of the SAG Representatives reported on 11 January 2016, export consultants are prohibited from using the POD to publish profiles.

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 as such is not an aim but a vehicle to achieve their business targets.

The first question to be addressed is whether the clients have developed realistic internationalization strategies, which can be pursued with the financial and personnel capacities at their disposal. Further, it needs to be analysed whether the approach suits the clients' companies or is it rather contradicting the corporate strategy.

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 of respective markets (e.g. Scandinavia) will be planned and implemented in

[9] For certain technology transfer and license agreements, long term cooperation may not be envisaged.

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. China 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 have to 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.

With the help of a well-prepared company meeting, the profile writer can gather useful information, revealing the weaknesses and strengths, as well as the main objectives of the client. Based on the research, the writer could define the cooperation request(s) of the client and hence, draft a high-quality profile.

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?

For more guidance on how to prepare a profile, the 'Partnership Tools' on the intranet are useful. The Guide to the partnership process[10] explains the entire process from the very first meeting with an interested company to a potential Partnership.

Network partners have developed a helpful tool called EasyPP[11], which makes the profile creation process more transparent for the clients. Easy PP allows the profile creators to draft online a first version of the clients' POD profiles. A link is generated by the system that you can send to the client. He or she can view the profile and can make online amendments. All versions are documented in the system. Once the final draft is established in EasyPP, the profile creator can submit the profile directly to the POD section of the Network IT Platform. Please note, its is the responsibility of the providers of partnership tools like EasyPP to make sure that their tools are in line with the newest version of these guidelines.

2.2. How to write a good profile: general rules

To ensure the good quality of your profile, it is necessary to comply with the 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 (except common ones such as DNA, SME, ICT/IT, OEM, ISO, GPS, NASA).

- **Check spelling and grammar**

  Run a spell check before submitting a profile - MS-Office or web browsers can be used for that purpose.

  Read the profile once more before submitting it (or, if possible, have a native English speaker proofread the profile).

  Avoid unnecessary use of capital letters

- **Make sure that the profile is consistent**

  Always make sure that the types of partnership selected correspond to what has been stated in all the other fields.

- Profiles should be **anonymous**

  Do not disclose brand, company, organisation, trade names (either written in the profile or visible on attached pictures).

  Do not disclose patent numbers or patent titles.

[10] http://een.ec.europa.eu/system/files/documents/15-04-10_profile_drafting_guidelines_final.pdf

[11] http://res.ivf.se/easyPP/

Do not copy-paste information from websites, as this makes it very easy to identify the company

- **Avoid repetitions** (i.e. copy – paste), especially in the title, summary and description.
- **Avoid marketing speak** (the profile should not sound like an advertisement)
- Write a profile in the **3rd person.** The use of "we, our, you, your" is not allowed.

3. Step-by-step guidance

3.1. Defining the profile type

3.1.1. Types of profiles

There are 3 categories of profiles divided into 5 profile types. The 3 categories are: Business profiles, Technology profiles and Research profiles. Within the Business and Technology profiles there is a distinction between an **offer** and a **request**. For Research & Development profiles you can only write a request to find a partner for a particular European research project.

Business profiles	1. Business OFFER (BO) 2. Business REQUEST (BR)
Technology profiles	3. Technology OFFER (TO) 4. Technology REQUEST (TR)
Research & Development profiles	5. Research & Development REQUEST (RDR)

3.1.2. Business versus 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:

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

3.1.3. Business Offer versus Business Request

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

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

- 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 to those which the Network offers (e.g. export consultants). Such companies are in direct competition. Their profiles will not be published[12].

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.

3.1.4. Technology offer versus Technology request

A **Technology Offer** is a description of a specific innovative technology, process, or specific know-how 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.

3.1.5. Research & Development Request

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

[12] http://een.ec.europa.eu/my/intranet/publication-pod-profiles-originating-export-consultants

- Your client wishes to find a partner to join a consortium for a research project under a specific call, funded by the European Union;

- You 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 a COSME-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. As such, POD does not accommodate Research & Development Offer profiles. If you have a client that wishes to offer their know-how, skills and/or technology with a view to joining a project consortium it is recommended to consider drafting a Technology Offer profile and selecting ‘Research cooperation agreement’ as one of the anticipated agreement types. However, as noted above, 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.

3.2. Inserting a new profile in POD

To create a profile, go through the following steps:

1. Click on the 'Partnering' tab, select the 'Profiles' tab, then 'Create New....'
2. Select the profile type you want to create from the list.
3. The 'Create Profile' form contains different tabs: Details, Dissemination, Client, Call (only R&D profiles), Partner Sought, Attachments, and Review. Go through each of the tabs carefully and enter the necessary information in each field. In the 'Review' tab in particular, include comments, if necessary, for the internal reviewer who will review the profile. These comments will not appear on the profile when published.
4. At the bottom of the profile, click 'Save and continue' to save a draft version of the profile if you wish to continue working later (the draft will be stored in your My Profiles Dashboard). Click 'Submit Profile for Review' to send the profile for internal review or click 'Back' to cancel the profile and return to the dashboard without saving.
    - If all the information in your form is correct and you click 'Submit Profile for Review', the profile will be submitted for internal review.
    - If one or more of your tabs are not completed and you press 'Submit Profile for Review', the incomplete tabs will be marked in red and there will be a notification to correct the errors in the form in order to submit the profile.

Please note that, once you have clicked on “Submit Profile for Review” it is not possible to access the profile to make any further amendments, so make sure that you’ve checked that it meets the requirements of the guidelines before you click. If you realise too late that further changes are needed, you will have to contact your internal reviewer to ask them to send the profile back for revision.

For more information on how to manage and disseminate your profiles and how to deal with EoIs, please refer to the Network IT Platform Partner User Guide[13].

[13] http://een.ec.europa.eu/tools/Help/Master.html

3.3. Filling in your profile: guidance on the different fields of a profile

This chapter will give you an overview of the different fields you will come across when creating a new profile. The chapter is organised based on the different tabs which you can find on top of the profile form in POD: Details, Dissemination, Client, Partner Sought, Call, Attachments and Review.

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

When a field is mandatory, you will see that it is written accordingly next to the title/name of each field. **Mandatory fields** are also marked with an asterisk (*) in POD. These mandatory fields may differ depending on the type of profile you choose to create.14

For each field, you will first find general information on how the field should be completed in terms of information and style, followed by specific directions for each profile type: BO, BR, TO, TR and RDR.

3.3.1. Details

3.3.1.1. 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 may not be entered writing all words in capital letters. Please also do not start every word in the title 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 include also 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.

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. H2020, Eurostars, etc.). It is not necessary to indicate the full name of the funding call/application in the title as this will be detailed within the profile.

[14] Whenever the present guidelines indicate that a field is mandatory, this means that this field should be filled in, regardless of whether the given field is marked as mandatory in the POD database or not.

3.3.1.2. Internal reference

You may wish to include an internal reference for the profile to enable you to maintain consistency with any referencing norms that you use in your organisation. This is an optional field. It has no relation to the POD reference which is generated automatically by the Network IT Platform for each profile created. The internal reference will remain only visible to people within your own organisation so as to ensure anonymity. This is because Network partners often use client information as the internal reference for a profile.

3.3.1.3. Summary - mandatory field

This field will be read immediately after the title and will be the basis on which the reader will form an opinion. It should be clear, concise, attractive and free of spelling errors, typos and unexplained acronyms. Within the limited space (500 characters) it should summarize the main information contained in the profile. It is therefore advisable to write the summary last. The summary should never be a copy-paste of the title or of the first paragraph of the description. If five or fewer countries are targeted, they should be mentioned in the summary.

Tip: Many network partners only disseminate the titles and summaries of profiles to their clients in a first step, to save time and avoid an overflow of non-relevant information. Only if the 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? (In relation to the NACE keywords/ mentioned in the 'KEYWORDS' field further in the profile).

- About the products:

  What products/services is the client offering/requesting?

  What will the products/services be used for?

- About the cooperation types:

  What types of partnership are considered? All the selected types of partnership should be mentioned in the summary. Therefore it is strongly recommended to focus on 1-3 cooperation types as a maximum.

- Are 5 or fewer countries targeted? If so, which ones?

It is also a good practice to provide a small overview of the advantages and innovations of the product/services offered/requested; these will then be fully discussed 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 deal(s)/partnership(s) is/are sought? All the selected types of partnership should be mentioned in the summary. Therefore it is strongly recommended to focus on 1-3 cooperation types as a maximum.

- Are 5 or fewer countries targeted? If so, which ones?

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?

- 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)

- About the cooperation types:

  What type of deal(s)/partnership(s) is/are sought? All the selected types of partnership should be mentioned in the summary. Therefore it is strongly recommended to focus on 1-3 cooperation types as a maximum.

- Are 5 or fewer countries targeted? If so, which ones?

For **Research & Development Requests**:

A good summary should contain the following pieces of information:

- About the project coordinator/partner:

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

  What kind of organisation is the coordinator/partner?

- About the project:

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

- About the partnership:

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

  What types of partnerships are sought? What will be the role of the partner?

- About the programme:

  Under which funding programme will the project be submitted? (e.g. Horizon 2020 sub-programme X or Y, Eurostars, COSME, LIFE, etc.)

3.3.1.4. Description - mandatory field

The description should be perceived as a full stand-alone text. Here you have the opportunity to 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 or not 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 an **international cooperation** is envisaged.

The description should be well structured and written in full sentences.

It is recommended to attach a picture or drawing to the description field. This can be done in the attachments tab of the new profile. The following types can be uploaded: .jpg, .jpeg and .gif. Make sure that the brand names / company's name are not visible on the picture or in the title of the file.

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

A good description should contain the following pieces of information:

- The client and its background:

  The country of origin

  The field of activity of the client (be coherent with the selected NACE codes)

  The particular 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.

- 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, but don't just include a long list of products or services as this makes the profile much more difficult to read. If you do want to list products etc., consider using bullet points.

- The desired partnerships:

  All selected types of cooperation (selected in the field 'Types of Partnership Considered', see below) should be explained, not simply stated. 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:

- The client and its background:

  The country of origin

  The field of activity of the client (be coherent with the selected NACE codes)

  The particular 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.

- 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 which you can later elaborate on.

- The desired cooperation type:

  All selected types of partnership (selected in the field 'Types of Partnership Considered', see below) should be explained, not simply stated. 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? Explain how the client sees the long term commitment and the practical organisation of the cooperation.

For **<u>Technology Requests</u>**:

A good description should contain the following information:

- The client and its background:

  The country of origin

  The field of activity of the client (be coherent with the selected NACE codes)

  The particular 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.

- 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:

  All selected types of cooperation (selected in the field 'Types of Partnership Considered', see below) should be explained, not simply stated. 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 **<u>Research & Development Requests:</u>**

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 layman.

- 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

3.3.1.5. 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.

Try to be as specific as possible without disclosing any information likely to reveal the client's identity. 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 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.

3.3.1.6. 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? And 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 also what is not needed, for example in terms of:

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

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

3.3.1.7. Stage of development - mandatory field for TO

For **Technology Offers:**

Select the most appropriate stage from the drop-down list and give comments if applicable.

For **Technology Requests:**

This field is not mandatory for Technology Requests. However, it does add value to the profile to discuss in this field if 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).

3.3.1.8. IPR Status - mandatory field for TO

For **Technology Offers:**

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

- Copyright
- Design Rights
- Exclusive Rights

- Other
- Patent(s) applied for but not yet granted
- Patents granted
- Secret Know-how
- Trade Marks

Use the comments field to give more details about the IPR status. This will help the prospective partner to assess whether appropriate IP protection is in place to satisfy their needs. For example it is highly recommended to provide information regarding the key countries or territories for which protection has been granted or applied when the following IPR fields have been selected:

- Design rights
- Patent(s) applied for but not yet granted
- Granted patent
- Trademarks

For example – if 'Granted patent' or 'Patent(s) applied for but not yet granted' are selected, you could add a comment 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 USA.

If 'Other' is selected, please clarify what this is in the comments field.

Please do not disclose the patent number or patent title.

For **Technology Requests:**

This field is not mandatory for Technology Requests. However it does add value to the profile to discuss in the comments field if the client requires a specific level of IP protection for the technology sought (if not already described in the 'Technical Specifications or expertise sought' field).

3.3.1.9. Deadline for call – mandatory field for RDR profiles

3.3.2. Dissemination

3.3.2.1. Technology keywords - mandatory field for TO and TR

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

- Use level three keywords: they are the most specific.
- Be aware that a search may be conducted using keywords alone.
- 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.

3.3.2.2. Market keywords - mandatory field

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

- Use level three keywords: they are the most specific.
- Be aware that a search may be conducted using keywords alone.
- Focus on market application(s).

3.3.2.3. Issuing partner

This field will automatically populate with the organisation that is creating the profile.

3.3.2.4. Responsible

Usually this entry would be completed by the person creating the profile so their own name should be selected. However there may be instances where you need to create an entry on behalf of a member of your team. In this field you must indicate the person in your organisation that is responsible for the profile. They will be the default contact for the client and seen as first point of contact.

3.3.2.5. Sector Group

Indicate which sector group 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.

3.3.2.6. Restrict dissemination to specific countries

It may be necessary to restrict 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. If this field is left blank the profile will be disseminated to all EEN countries. Please ensure that the countries selected in this list do not contradict other fields of the profile. Do not include your country in the list, as the focus of the profile should be on international cooperation.

If you restrict the dissemination of your profile to 5 or fewer countries, you should mention these countries in the summary.

3.3.3 Client

3.3.3.1. Type and size of client - mandatory field

Select the type and size of the organisation behind the profile.

If the option ‘other’ is selected then the type of organisation behind the profile should be mentioned in the summary and explained in the description.

3.3.3.2. Year established - mandatory field for BO and BR

Indicate the year the client company was established. This is often a useful indicator in order to determine a client’s stability and experience within a certain field or expertise.

3.3.3.3. NACE Keywords - mandatory field

Choose minimum one and **maximum five** NACE keywords applicable to the **client's activity**.

- Use level three keywords: they are the most specific.
- Be aware that a search may be conducted using keywords alone.
- Focus on how the NACE code describes the client behind the profile, not the content of the profile.

3.3.3.4. Turnover (in euro) - mandatory field for BO and BR

Select the current approximate annual turnover in euro (€) of the client organisation/company.

3.3.3.5. Already engaged in trans-national cooperation

If the client is already engaged in a trans-national cooperation, mark the checkbox. This is a good indicator of the client's experience and understanding of the intricacies of cooperating across borders.

3.3.3.6. Additional comments

If necessary, add any supporting material relating to the experience of the client and their activities. Useful information to add here includes the number of years of existence, position in market, level of transnational activity, knowledge of market/product, other activities of the client. Please do not just repeat details already given. Make sure that useful new information is added: do not simply repeat information already given elsewhere.

3.3.3.7. Certification standards

If applicable, indicate all internationally recognised standards that the client has (e.g. ISO9001). All major global standards can be selected including major variants of: AS, BS, DIN, ECOCERT, ELOT, EMAS, EN, FSC, GOST, ISO, OHSAS, MGIP, SA, SO, SPWG, TCO, TS, TSE, HACCP and VESA standards. For standards that are recognised at regional and national level select ‘Other’.

3.3.3.8. Languages spoken - mandatory field

Indicate all languages that the client can speak to a professional, business level.

3.3.3.9. Client's country

Select the main location of the client company. The POD defaults to the country of the profile creator.

3.3.4. Partner sought

3.3.4.1. Type and role of partner sought - mandatory field

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

For each of the selected cooperation type, please try to indicate the following information in relation to the desired partner:

- Type: describe the type of organisation sought (e.g. industry/academia).
- Activity: describe the field of activity of the desired partner (e.g. pharmaceuticals, agrofood, etc.) and/or the qualities/expertise it should have.
- Role: describe what the partner will be expected to do (e.g. co-development of new drug).

Make sure this field is coherent with the selected cooperation types under 'Type of Partnership Considered' (see below).

3.3.4.2. Profile is open for expression of interest

Uncheck this box if you do not wish to receive EoIs for this profile. This can be edited at any time (usually if you have received many EoIs for the profile but do not want to progress immediately with the next steps of the partnership process).

3.3.4.3. Type and size of partner sought

Select the desired type and size of the organisation 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.

3.3.4.4. Type of partnership considered - mandatory field

Indicate in this field the type(s) of partnership that the client is interested in. It is possible to select more than one cooperation type. However, it is strongly recommended not to choose more than 3 to render focus to the profile.

All the selected partnership types in this field have to be mentioned in the summary and described/clarified in the description field.

The lack of consistency across the "Type of partnership considered" field and other profiles fields is one of the most frequent reasons for a reviewer to put a profile 'on hold'.

For **Business Offers and Requests**, you can choose from the following list of cooperation types. Definitions for each cooperation type per profile type can be found in Annex II.

- Acquisition agreement
- Commercial agency agreement
- Distribution services agreement
- Financial agreement
- Franchise agency agreement
- Joint venture agreement
- License agreement:
- Manufacturing agreement
- Outsourcing agreement
- Reciprocal production

- Services agreement
- Subcontracting

For **Technology Offers and Requests**, you can choose from the following list of cooperation types:

- Commercial agreement with technical assistance
- Financial agreement
- Joint venture agreement
- License agreement
- Manufacturing agreement
- Research cooperation agreement
- Services agreement
- Technical cooperation agreement

For a **Research & Development Request**, the only possible type of cooperation that you can select is a 'Research cooperation agreement.'

3.3.5. Call: only for Research & Development Requests (RDR)

3.3.5.1. Framework Programme - mandatory field

Choose which framework programme the R&D project is associated with from the drop-down list.

3.3.5.2. Call Name – mandatory field

Indicate the name of the specific call under the given the programme.

3.3.5.3. 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 2020, 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 many involve more than two-stages. You should thus indicate at which exact submission step the proposal is and which steps remain to be completed.

3.3.5.4. Anticipated project budget

Indicate the anticipated project budget. Please specify the currency.

3.3.5.5. Coordinator required

Check the check box if you are seeking a coordinating partner for the project.

3.3.5.6. Deadline for Call - mandatory field

Choose the deadline for your call. Scroll through the calendar that opens automatically. After this date, the request will no longer be displayed in the system or subject to offers.

3.3.5.7. Project duration

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

3.3.5.8. Web link to the call

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

3.3.5.9. Project title and acronym

Enter the project title if known and any corresponding acronyms.

3.3.6. Attachments

It is possible to add attachments to support a profile. This can be useful to describe complex products/services/technologies in order to allow non-specialists to understand a concept.

Keep in mind that the images uploaded should not reveal company/product names or brand names. The file name of the attachment should not reveal any company/product or brand name because the file name is displayed as 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: .jpg, .jpeg and .gif. Other file types are not compatible.

3.3.7. Review

If you have additional **comments** for the internal reviewer or the external reviewers please add them in the designated 'comment box'. Any text you write in this field will not be displayed on the profile once it is published.

Annex I: Check lists of required information

Business OFFER

FIELD	REQUIRED INFORMATION
Title	✓ Product/service on offer ✓ Key cooperation type *TIP: the title should be concise and meaningful.* *TIP: no typos, no abbreviations/acronyms, no brand/product names, no marketing speak or unnecessary capital letters.*
Summary	✓ Country of origin + field of activity ✓ Product/service on offer ✓ ALL cooperation type(s) ✓ Target countries if 5 countries or less are targeted *TIP: no typos, no abbreviations/acronyms, no brand/product names, no marketing speak or unnecessary capital letters.* *TIP: no copy-paste of the title or 1st paragraph of the description.*
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 all the selected cooperation types: ○ WHY were these cooperation types selected? (What would be the desired outcome of an international partnership?) ○ HOW is the international cooperation envisaged (ALL selected types of cooperation should be explained, not simply stated) *TIP: no long lists; use short but complete sentences.* *TIP: add a picture (no brand names).*
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. quantifications, certification standards, past international successes etc.).*
Keywords	✓ Market keywords: *Maximum 5*
Client	✓ Type and Size of client ✓ Year Established ✓ NACE keywords ✓ Turnover (euro) ✓ Languages Spoken
Partner sought	✓ Type/Field of activity of partner per selected cooperation type ✓ Role of partner per selected cooperation type *TIP: avoid generalities (e.g. the partners should be reliable and professional; industry/company), be specific (commission; field of activity…).*
Types of Partnership Considered	✓ Select the most accurate *TIP: focus on 1-3 cooperation types. Make sure that the selected cooperation type(s) correspond to what is written in the summary, description and the partner sought fields.*

Business REQUEST

FIELD	REQUIRED INFORMATION
Title	✓ Product/service requested ✓ Key cooperation type *TIP: the title should be concise and meaningful.* *TIP: no typos, no abbreviations/acronyms, no brand/product names, no marketing speak or unnecessary capital letters.*
Summary	✓ Country of origin + field of activity ✓ Product/service requested ✓ ALL cooperation type(s) ✓ Target countries if 5 countries or less are targeted *TIP: no typos, no abbreviations/acronyms, no brand/product names, no marketing speak or unnecessary capital letters.* *TIP: no copy-paste of the title or 1st paragraph of the description.*
Description	✓ Country of origin + field of activity ✓ Product/service requested in more detail: main features and application fields of the product/service ✓ Justification of all the selected cooperation types: o WHY were these cooperation types selected? (What would be the desired outcome of an international partnership?) o HOW is the international cooperation envisaged (ALL selected cooperation types should be explained, not simply stated) *TIP: no long lists; use short but complete sentences.* *TIP: add a picture (no brand names).*
Technical specification & expertise sought	✓ Specific requirements needed by the client or from the potential partner
Keywords	✓ Market keywords: *Maximum 5*
Client	✓ Type and Size of client ✓ Year Established ✓ NACE keywords: *Maximum 5* ✓ Turnover (euro) ✓ Languages spoken
Partner sought	✓ Type/ Field of activity of partner per selected cooperation type ✓ Role of partner per selected cooperation type *TIP: avoid generalities (e.g. the partners should be reliable and professional; industry/company), be specific (commission; field of activity…).*
Types of Partnership Considered	✓ Choose 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.*

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.*
Summary	✓ Type of organisation + country of origin + field of activity ✓ Technology/know how → main advantage/innovativeness AND (potential) application field ✓ ALL cooperation type(s) ✓ Target countries if 5 countries or less are targeted *TIP: no typos, no abbreviations/acronyms, no brand/organisation names, no marketing speak or unnecessary capital letters.*
Description	✓ Type of organisation + country of origin + field of activity ✓ Set the scene: o Give an outline of the problem that is addressed by this technology o Give an outline of the state of art (e.g. existing technology solutions) ✓ Main features of the technology and application field(s). ✓ Justification of all the selected cooperation types: o WHY were these cooperation types selected? (What would be the desired outcome of an international partnership?) o HOW is the international cooperation envisaged (ALL selected cooperation types should be explained, not simply stated) *TIP: the description should be understandable for a layman.*
Advantages & innovations	✓ Innovativeness of the technology/specificity of the know how in comparison with existing solution/competitors
Stage of development	*TIP: the selected option should be consistent with the description and the selected cooperation types*
IPR status	*TIP: it is highly recommended to provide information regarding the key countries or territories for which protection has been granted or applied*
Keywords	✓ Technology keywords: *Maximum 5* ✓ Market keywords: *Maximum 5*
Client	✓ Type and Size of client ✓ NACE keywords: *Maximum 5* ✓ Languages spoken
Partner sought	✓ Type/ Field of activity of partner per selected cooperation type ✓ Role of partner per selected cooperation type *TIP: avoid generalities (e.g. the partners should be reliable and professional; industry/company), be specific (commission; field of activity…)*
Types of Partnership Considered	✓ Choose the most accurate. *TIP: focus on 1-3 types of cooperation* *TIP: make sure that the selected cooperation type(s) correspond to what is written in the summary, description and the partner sought fields.*

Technology REQUEST

FIELD	REQUIRED INFORMATION
Title	✓ Technology/know how requested *TIP: the title should be concise and meaningful.* *TIP: no typos, no abbreviations/acronyms, no brand/organisation names, no marketing speak or unnecessary capital letters.*
Summary	✓ Type of organisation + country of origin + field of activity ✓ Technology/know how needed and WHY (what do they want to develop/improve?) ✓ ALL cooperation type(s) ✓ Target countries if 5 countries or less are targeted *TIP: no typos, no abbreviations/acronyms, no brand/organisation names, no marketing speak or unnecessary capital letters.*
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 all the selected cooperation types: o WHY were these cooperation types selected? (What would be the desired outcome of an international partnership?) o HOW is the international cooperation envisaged (ALL chosen types of Partnerships considered should be explained, not simply stated) *TIP: the description should be understandable for a layman.*
Technical specification & know how	✓ Specific technical requirements/know how from the potential partner
Keywords	✓ Technology keywords: *Maximum 5* ✓ Market keywords: *Maximum 5*
Client	✓ Type and Size of client ✓ NACE keywords: *Maximum 5* ✓ Languages spoken
Partner sought	✓ Type/Field of activity of partner per selected cooperation type ✓ Role of partner per selected cooperation type *TIP: avoid generalities (e.g. the partners should be reliable and professional; industry/company), be specific (commission; field of activity…)*
Types of Partnership Considered	✓ Choose 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.*

Research & Development REQUEST

FIELD	REQUIRED INFORMATION
Title	✓ Framework programme or the name the national (non-EU-funded call) ✓ Targeted type/role of partner *TIP: do not start the title with 'partner search' or 'PS'. This is implied by the nature of a RDR profile. No spelling errors, no unnecessary capital letters, no unexplained acronyms.*
Summary	✓ Type of organisation + country of origin + field of activity coordinator/partner ✓ Concise description R&D project (i.e. objective) ✓ Programme call (e.g. Horizon 2020 sub-programme, Eurostars, Interreg, COSME, LIFE, etc.) or the name of the non-EU funded call ✓ Field of activity/expertise and role of the partner sought *TIP: no spelling errors, no unnecessary capital letters, no unexplained acronyms.*
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 layman.*
Keywords	✓ Technology keywords: *Maximum 5* ✓ Market keywords: *Maximum 5*
Client	✓ Type and Size of client ✓ NACE keywords: *Maximum 5* ✓ Languages spoken
Partner sought	✓ Type and Role of partner sought ✓ Type of Partnership Considered: Research cooperation agreement.
Programme-Call	✓ Framework Programme ✓ Call Name ✓ Evaluation Scheme ✓ Deadline for Call ✓ Funding Scheme

Annex II: Definitions of partnership types

Business profiles

OFFER	REQUEST
Acquisition agreement: an agreement governing the merger or the transfer of shares between companies.	
Your client offers the company or shares of the company for sale.	*Your client wishes to buy shares of a company.*
Financial agreement: an investment agreement in a project or endeavour. It can take the form of a loan or a partial transfer of shares for example.	
Your client is looking for investors/investments in their company/project.	*Your client wants to invest in another company.*
Joint venture agreement: a business agreement whereby two companies decide to develop a new entity, usually for a well-defined period of time or for a specific project. Both parties contribute in terms of equity to the creation of this temporary partnership.	
Your client has a specific project which requires a Joint Venture and is looking for a partner with supplementary skills/resources.	*Your client is looking to join a partner with a specific project.*
License agreement: A transfer of rights involving an authorization (by the licensor) to use the licensed material (by the licensee), in return for a fee or share of royalties.	
Your client is offering a license/ looking for licensees.	*Your client is looking to buy a license.*
Reciprocal production: an agreement between two or more parties to share their resources to achieve a common objective of production.	
A client willing to engage in reciprocal production may as well do so through a Business Offer or Business Request as in this particular situation the client would at the same time be offering to produce something in common with another company and simultaneously request a partner who would agree to share resources in order to produce something in common.	
Trade intermediary services	
Commercial agency agreement: an agreement establishing a fiduciary relationship whereby an agent represents a principal and may take actions that bind the principal legally. Payment to the agent is usually made in the form of a commission but an agent may also work on a retainer basis.	
Your client is looking for an agent to represent its products or services.	*Your client is willing to act as an agent to represent other companies' products or services.*
Distribution services agreement: an agreement between a company in need of having its **products** distributed and the distributor that specializes in providing that function. A distribution agreement can be exclusive or not. A distributor is a company that buys and	

sells **products** from another company. It is **not** possible to set up a distribution agreement for services.	
Your client is looking for a distributor to sell its products.	*Your client is willing to act as a distributor to sell other companies' products.*

Franchise agency agreement: a franchise is the right to market or sell goods or services under the trademarked name, or patented process, of an established business. Under a franchise agreement, the franchisee is permitted and encouraged to use the trademarks and brand name of the franchisor as part of its everyday business practices, but must follow specific guidelines. The franchisor also provides marketing and training support to help the franchisee succeed.	
Your client is offering its trademark or process to potential franchisees.	*Your client wants to become a franchisee.*
Long-term service or manufacturing activities	
Services agreement: an agreement between two entities where one agrees to provide a specified service to the other.	
Your client is offering a service.	*Your client is looking for someone to perform a specific service.*
Manufacturing agreement: an agreement between a company which has developed a product and a manufacturer with an eye on production of the product.	
Your client is offering to manufacture certain products.	*Your client is looking for manufacturers of certain products.*
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.	*Your client is looking for companies to which they could outsource part of their business process*
Subcontracting: a contract with an independent contractor that assigns some of the obligations of a prior contract to this independent contractor.	
Your client is offering to become a subcontractor.	*Your client is looking for companies to whom they could assign a part of a specific contract.*

Technology profiles

Preliminary remark:

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

OFFER	REQUEST
Commercial agreement with technical assistance: an agreement arranging the acquisition of a product/technology paired with the provision of a number of services in support of, or essential to, a transfer of technology.	
Your client has developed a product or technology and offers it for acquisition, offering to support the transfer of the technology.	*Your client is looking to purchase a technology/innovative product and requires the necessary support.*
Financial agreement: an investment agreement in a project or endeavour. This can take the form of a loan or a partial transfer of shares for example.	
Your client has an innovative project for the development of a product or technology, needs financing and offers the project to investors.	*Your client is looking for technology projects for investment purposes.*
Joint venture agreement: a strategic alliance whereby two companies decide to develop a new entity, usually for a well-defined period of time or for a specific project. Both parties contribute in terms of equity to the creation of this temporary partnership.	
Your client has a specific technological project and is looking for a partner.	*Your client is looking to join a partner with a technological project.*
License agreement: a transfer of rights involving the authorization (by the licensor) to use the licensed material (by the licensee) , in return for a fee or share of royalties	
Your client is offering a license/ looking for licensees.	*Your client is looking to buy a license.*
Cooperation agreements	
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.*
Technical cooperation agreement: an agreement between two entities whereby resources are pooled and skills are shared to further the development of the technical aspects of a product or technology (which is at prototype stage for example). The purpose is to enable the parties to accomplish more than they could have done alone.	
Your client has started developing an innovative product/solution and looks for a partner with specific existing technological capacities, to help him continue the technological development.	*Your client has started developing an innovative product/solution and needs a technology to be developed to be able to continue. Therefore they look for a partner possessing technological expertise and the ability to help them further.*

<table>
<tr><th colspan="2">Long-term service or manufacturing activities</th></tr>
<tr><td colspan="2">Manufacturing agreement: an agreement between a company which has developed a product and a manufacturer with an eye on production of this product. These types of agreements only fall under the technology profiles/partnerships category if they involve some element of transfer of expertise, know-how, technology and/or training.</td></tr>
<tr><td>Your client is offering its innovative manufacturing capacities.
Your client has developed an innovative product and wants to have it manufactured.</td><td>Your client requests manufacturing facilities with a specific production technology process.</td></tr>
<tr><td colspan="2">Services agreement: an agreement between two entities where one agrees to provide a specified service to the other.</td></tr>
<tr><td>Your client is offering its specific technological services.</td><td>Your client requires specific technological services in the long run.</td></tr>
</table>