

**Idealist2018 Project**



**Ideal-ist Partner Search System -  
Manual for Proposers**

## Section 1 Contents

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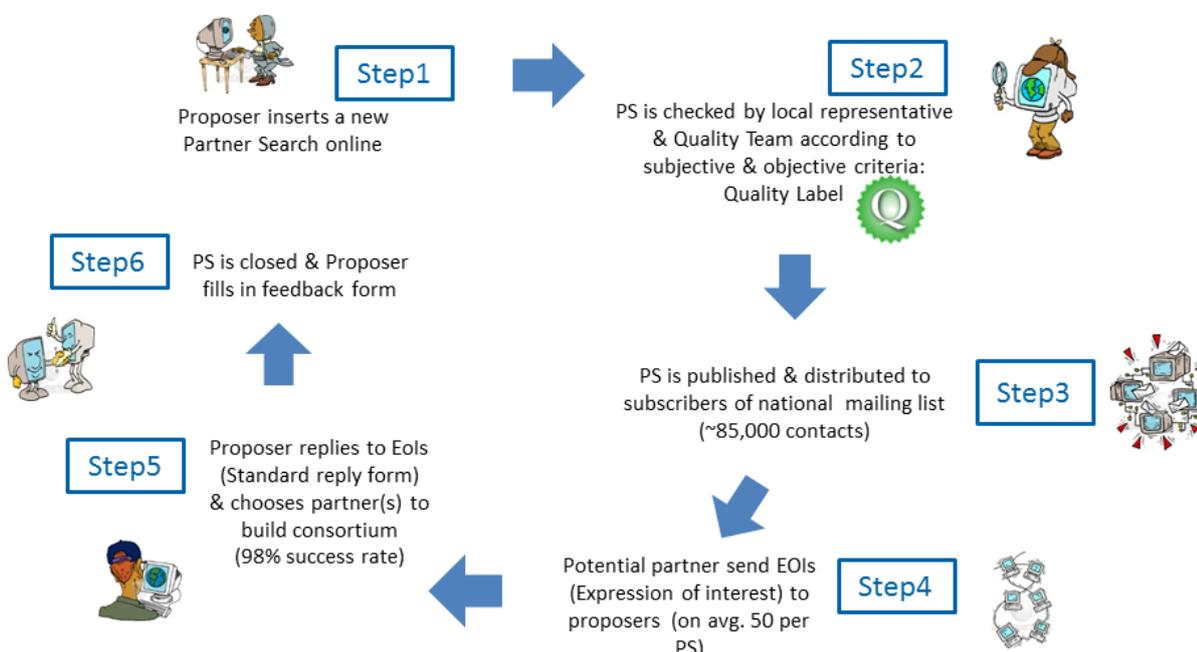
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# 1 The Partner Search Publication Procedure

The whole process for launching and managing Partner Searches will be centralised through the main Ideal-ist web site: [www.ideal-ist.eu](http://www.ideal-ist.eu). This is where we will be referring to through the rest of this document.

## 1.1 Process of the Partner Search (PS) system

### How Ideal-ist finds partner for you?



#### STEP 1

A proposer submits a project idea that matches according to him the Work Programme’s indications on research & technological development priorities for a specific objective in a specific Call. The PS Form with the guided drop-down menu supports the proposer in identifying available Challenges and Open Objectives, Type of Projects, Call deadlines.

**STEP 2**

The Quality Team (QT) checks the PS according to Subjective and Objective criteria and gives a feedback. The National Representative refers back to the proposer using the Communication Tool provided for this purpose.

The proposer receives the comments and recommendations and has to modify the PS Form taking them into consideration, then resubmits the PS Form providing indications on what he changed by using the Communication Tool.

The PS Form goes from the 'Private' Folder into the 'Pending' Folder when the proposer submits the PS Form and it is available in the National Representative and the Quality Team pages. It goes into the 'Sent Back' Folder to track down the PS when it is sent back to the proposer.

This way the Partner Search does not simply disappear but a copy of the last PS version, which was sent back to the proposer, is kept in the 'Sent back' Folder. When a new PS is submitted then this PS disappears and the new PS is available under the 'Pending' section.

Following the results of the QT's check the PS receives a Quality Label (QL) from the Quality Manager.

**STEP 3**

The PS is then published automatically and is put into the 'Open' Folder, i.e. it is distributed to all Idealist2018 Partners who will further distribute it to the Challenge and Objective specific subscribers in their own country, to other proposers in the same topic and to all registered users according to the topics they have defined.

**STEP 4**

The constituency interested in participating in the Framework Program reads the PS Form containing the project idea (subject, short description of main purpose and expected results) and partners sought (Type of Partner, Requested Expertise, Tasks to be carried out in the project). Potential Partners file an application by submitting an Expression of Interest (EoI) that is directly sent to the proposer by email and stored in his Administration Pages. Potential Partners will highlight their ability to meet the requirements set out in the PS Form by indicating their expertise, competences and past experience in the subject area.

**STEP 5**

The proposer will use the Response Management Tool to reply to incoming EoIs. This tool allows:

- see all EoIs at a glance in a list,
- reply to each EoI singularly or to a set of EoIs by ticking the corresponding boxes and sending out a standard message to all – this is particular convenient when the proposer has to turn down applications and he wants to thank everyone for their application
- reply using the standard message that can be personalised for both EoI that will be “accepted” (a positive contact will be started with that potential partner) or “rejected”.
- In the second case, potential partners will not receive the personal details such as Name, Last Name, Email Address of the proposer, but a system email with the contents of the Proposer’s message.

A Proposer will close the PS Form once he has found all partners and formed a consortium or he decided not to go ahead, indeed he will be asked to specify the reason for closing the PS Form.

## STEP 6

Once the Call has been closed, the PS System does not allow submitting further PS since it works with a Call specific approach. The proposer is asked to fill in the Feed-back Form that collects a few data on the PS and the next steps performed. Proposer will indicate Proposal Number, Title, any changes with regards to Challenges and Objectives or other changes with regards to the PS Form, Number, Type, and Country of Origin of Partners included and found thanks to the PS System.

### 1.2 Registration.

Before accessing the main functionalities of the web site, any new potential proposer should register on [www.ideal-ist.eu](http://www.ideal-ist.eu). To do so, they should simply click on '**Register**' on the blue menu placed on the top of the main page.



To finalise the registration process, a few basic data about the new members and the organisations they are representing will be required by means of an electronic form. In addition, they will be able to choose their own 'User Name' and 'Password'.

[Create new account](#)
[Log in](#)
[Request new password](#)

### User Account Details

**Username: \***

Spaces are allowed; punctuation is not allowed except for periods, hyphens, and underscores.

**E-mail address: \***

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

### Personal Information

**Title: \***

**First Name: \***

**Street: \***

**City: \***

**Phone Number:**

**Organisation:**

**Department: \***

**How did you find out about us ?: \***



**Last Name: \***

**Postal code:**

**Country: \***

**Fax Number:**

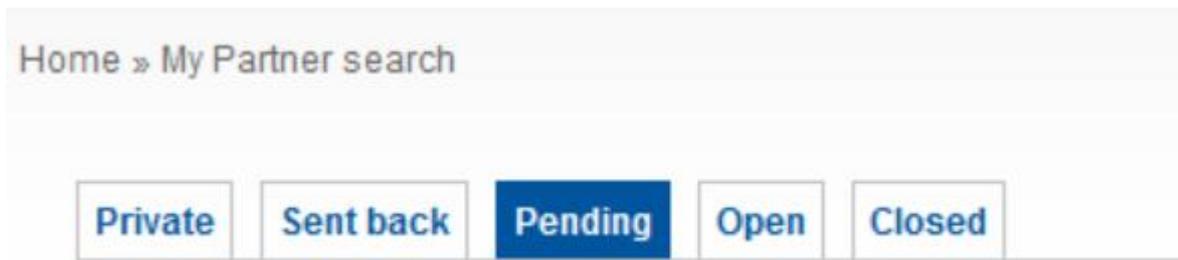
**Type of Organisation: \***

**Web Address:**

Once the registration process is completed, the new members will be able to access the system and all the services provided, through their own **Personal Home Page**.

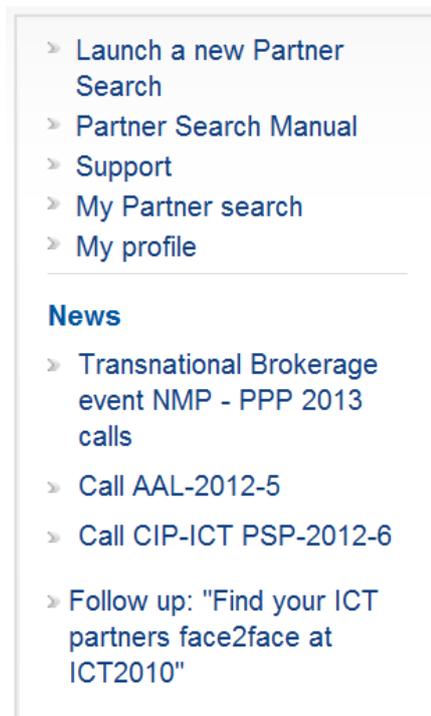
Particularly, by means of the **Control Panel Menu** on the right of the page, the main features provided will be:

- Launching Partner Search Forms for any ICT Calls available at the time (including CIP-PSP, AAL, ENIAC, etc.).
- Searching for any other published Partner Searches using the corresponding search engine.
- Searching for Expression of Interests received for the proposer’s own Partner Searches
- Through “My Partner Searches” managing Partner Search Forms through the different phases of their life (**Private/Sent Back/Pending/Open/Closed**), the responses received for the published ones by means of the response management tool, as well as compiling the feedback form for the closed ones.



- Closing the published Partner Searches once the appropriate partners have been found.
- Editing their own profile and changing their password.
- Downloading the Partner Search Manual

This all will be done by using the corresponding Control Panel:



### 1.3 Completion of the Partner Search Form

Among all the features provided to the registered members, the most important one will be the possibility to launch their own Partner Search to open ICT Calls. To do this, they should simply click on 'Launch a New Partner Search' on the right Control Panel. This will automatically open the corresponding electronic form with the following fields:

Home > Create content > Partner search

#### Launch a New Partner Search

Proposal Name: \*

#### PROJECT OVERVIEW

Call Identifier: <none>

Objective: - Select -

Funding Schemes: - Select -

Evaluation Scheme: - Select -

Closure Date: - Select -

Subject:

**B** *I* U [List Icons] [Link Icon] [Image Icon] [Text Color Icon] [Background Color Icon] [Cut Icon] [Copy Icon] [Paste Icon] Format [Format Dropdown]

Size: [Size Dropdown] [Font Color Icon]

#### Proposal Basic Information:

Call Identifier, Objective, Funding Scheme, Evaluation Scheme and Closure Date, all of them by means of combo boxes that are automatically filled out when only one option is possible due to previous selections.

#### Proposal at a Glance:

Then a **Proposal Name** should be provided, and a basic description of the project is to be included in the **Subject** field.

Objectives of the project should be further explained in the **Proposal Outline** field, but always trying to avoid delicate or confidential information. This will be complemented with the most important **Keywords** related to the objectives of the proposal using a comma (,) between the different keywords to facilitate the performance of the Search Engine.

**Partner Profile Sought:**

The most important information for Partner Search purposes should be provided in the following three fields, giving an overview of the different skills and expertise required for the realization of the project and the work they will carry out in its lifetime. Finally, the type of partner sought will be indicated for each of this Profile Sought.

The form provides the proposer also with the possibility to search for a coordinator for this specific proposal, and ask about the previous experience of the proposer coordinating/participating in EU ICT projects.

At the end of the form, the proposer has the possibility to indicate other email addresses of colleagues (or members of the consortium), who will be informed of all the responses generated to this specific Partner Search, in case they want to share this responsibility. This means that these additional people will also be informed by email of any response generated, but they will not be granted access to the Personal Home Page of the proposer, where all the information about his Partner Searches and responses will be stored.

**Guidelines** on how to fill out this form best will be provided in Appendix 1 to this document with the aim to launch much focused high quality searches. The best way to improve the quality of the responses starts by defining very clear and concise contents in the search form explaining what is to be done and what is needed to achieve it

Support from the Ideal-ist representatives is essential at this stage.

Finally, as this feature is only accessible for registered members, the contact data of the proposer will be inserted automatically, although it will not be public and not be shown on the form once published.

To finish the process, the proposer should accept the Confidentiality Clause and push the **'Save and Submit'** button. This will activate a **checking tool** that will highlight in yellow those fields not correctly completed. Upon successful submission of a complete form both, the National Representative and the Ideal-ist Quality Team will be informed and the validation process will be initiated. The proposer will be informed of this by means of an email.

If the proposer only clicks on **'Save a draft'**, the form will be saved with the current contents to be completed and submitted in a future time. All these drafted Partner Search forms will be stored under the folder labelled **'Private'** and can be continued by the proposer at any time later.

It is important to mention that, in those cases where the registered member is a consultant working on another organisation's proposal, the following data of the latter should be provided on the form: Name of the organisation that is the real proposer, city and country.

#### **1.4 Publication of the Partner Search Form**

Once the proposer clicks on **'Save and Submit'**, the Partner Search form will enter into a new phase. The first effect is that it will be moved from the folder **'Private'** to the one labelled

### ‘Pending’.

At the same time, both the corresponding National Representative and the members of the Quality Team will be informed of this new Partner Search form inserted in the system, inviting them to check its contents and initiate the corresponding discussion to grant it the Quality Label or not. Before initiating any discussion within the Quality Team, the National Contact Point should revise the contents of the PS Form himself and contact the proposer in order to **clarify which topic within the objective** the proposal is addressing and whether a pre-proposal check was performed by the Commission. This information will be used by the corresponding NCP to initiate the assessment together with the QT.

This assessment will be held by means of the Discussion Forum in the Discussion Board Folder. The proposer will not interact in this discussion, and their only participation will be to be invited to produce modifications on the form in case needed. To do this, the Ideal-ist National Representative will contact him through the Comments Box located at the end of the PS form in order to explain him what these suggested changes will be.

Finally, in the event of a positive outcome during the discussion between the National Representative and the Quality Team, the Quality Manager inserts the corresponding **Quality Label**.

This will have the following effects:

- The Partner Search will be automatically published on the website and will be distributed to all the members of the Ideal-ist Network.
- The Partner Search form will be moved from the folder ‘**Pending**’ to the one labelled ‘**Published**’, both on the National representative’s Administration pages and on the Proposer’s Personal Home Page.
- The contents of the Partner Search form will be publicly available through [www.ideal-ist.eu](http://www.ideal-ist.eu), with the exception of the contact data of the proposer and the information related to their previous experience. Instead of this information, a ‘**Reply**’ button will be used to contact the proposer, launching a **Standard Reply Form** expressly to that Partner Search.
- The proposer will be informed of this by email.
- From this moment on, the proposer will start receiving responses to this Partner Search.

In case both the National Representative and the Quality Team estimate the form does not fulfil the Quality Criteria (both objective and subjective) that rule the Ideal-ist Partner Search Mechanism, the National Representative will be responsible for ‘**Rejecting**’ the form and informing the proposer of this fact.

The National Representatives have the possibility to publish a PS without a QL (following the agreement of the Quality Team that the Partner Search complies with – at least – the objective criteria).

## 1.5 Distribution of the Partner Searches

Every time a new Partner Search form is published on the Ideal-ist web site, all the partners of the network will be informed by email of the basic information corresponding to that Partner Search. Once this happens, they will further re-distribute this email to their national

constituencies making use of their own-managed national mailing lists. The way each member of Ideal-ist does this is left to their own criteria and national conditions, but it is recommended not to delay too much this process to grant equal opportunities to the organisations present in every country of the network.

## 2 The Replying Procedure

The first thing to mention is that all the published Partner Search forms will be publicly available to everybody, and interested organisations do not have to register to [www.ideal-ist.eu](http://www.ideal-ist.eu) to be able to reply to these Partner Searches.

This way, when an interested organisation clicks on the 'Reply' button of an open Partner Search, the following Standard Reply Form will be displayed:

### Expression of Interest Form

Express Your Interest: insert your comments and data  
[Information on the PS](#)

**You comments**

Your Comments to the **Required Skills and Expertise** : \*

Highlight your skills and expertise proving inference to those requested in this Partner Search

Your Comments to the **Work to be carried out by the partner(s) sought** : \*

Highlight your capacity and resources available in carrying out the work requested

Your Comments to **Type of partner(s) sought** : \*

Highlight that your profile matches the type of partner sought

List here very shortly your experience of working on EU Programmes, National Programmes and Publications: \*

My organisation participated in an IST/ICT Project before

My organisation coordinated an IST/ICT Project before

**Your Data**

First Name: \*  Last Name: \*

Organisation: \*  Type of Organisation: \*

**News**

- > Transnational Brokerage event NMP - PPP 2013 calls
- > Call AAL-2012-5
- > Call CIP-ICT PSP-2012-6
- > Follow up: "Find your ICT partners face2face at ICT2010"

## 2.1 The Standard Reply Form

In this **Standard Reply Form**, the interested organisations are expected to provide appropriate comments to the skills and expertise required by the proposer, the work to be carried out, etc. from the point of view of their own experience in those areas. In addition, their previous experience and background on R&D programmes can be given.

At the end of the form, their contact data are required, informing the replying organisations that this data will not be public and it will only be forwarded to the proposer of that Partner Search and to other members of the Core Team, in case this option is used by the proposer. In the event of this replying organisation has been 're-directed' to Ideal-ist by another project, network or support action different to Ideal-ist (option 'How did you find out about us?'), a notification with this contact data will be sent to the responsible persons concerned with that project or network.

After accepting the Confidentiality Clause and clicking on 'Save', a **checking tool** will highlight in yellow those fields not correctly completed. Only when all the mandatory fields are completed, the reply form will be sent to the Proposer by email and published in the corresponding '**EoIs Page**' for that Partner Search, accessible only to that proposer by means of the list of '**Published**' Partner Searches in his Personal Home Page.

The information provided in this e-mail will be enough for the proposer to estimate the appropriateness of the replying organisation and contact them. Nevertheless, it is recommended that the proposers use the Responses Management Tool provided by means of their Personal Home Page to manage, select and reply to the interested organisations. This Responses Management Tool is explained further in Section 3.1.

In parallel to this process, an acknowledgement of receipt will be sent by email to the interested organisation, informing them of the correct delivery of their reply and providing them with the reply itself for their own records.

## 3 The Management of the process by the proposer: Personal Home Page

We have seen before that the registered members can use their Personal Home Page to keep track of the status of each of their Partner Searches through the complete validation process of the form:

- **Private**: The Partner Search form is considered a draft, and hence is only accessible to the corresponding proposer who can 'Save' it as many times as wished before submitting it and to the relevant national representative.
- **Pending**: The proposer already submitted a complete version of the Partner Search form that will be accessible to the corresponding National Representative and the Quality Team for validation. In this process, the proposer can be invited by his National Representative to produce modifications on the form and resubmit it with the aim of better focusing it to the objectives of the Call, or improve its contents.

- **Open:** The Partner Search form was positively evaluated by the National Representative and the Quality Team and was published and distributed. The proposer will be able to view the contents of the form and the corresponding responses generated.

- **Closed:** This folder is a repository of all the Partner Search processes finalized by that proposer, in case he needs to access its contents or the responses received, or still reply to pending Expression of Interests, and to compile the Feedback form.

This way, only those Partner Search forms under the folder '**Open**' will be publicly accessible through [www.ideal-ist.eu](http://www.ideal-ist.eu) and will generate responses and further actions.

Hence the following features only refer to them:

### 3.1 The Responses Management Tool

All the responses generated to a given Partner Search form will be stored and accessible to the proposer by means of his Personal Home Page. To view these responses, the proposer will only have to:

- 1) Log-in to the system using his own login and password.
- 2) Go to the corresponding list of published Partner Searches.
- 3) Access the 'EoI Section' of the corresponding Partner Search by clicking on the EoI folder.
- 4) The whole list of responses received to that Partner Search will appear and all the individual responses (contents and contact details of the replying organisation) will be accessible.

Once the proposer has checked out the received responses, this Responses Management Tool gives him the possibility to contact the replying organisations in an easy and fast way. The following two options are provided when contacting the replying organisations:

- **Accept:** It will include a standard approval text that the proposer will be able to personalise and the personal contact details of the proposer. The sender of this email will be the proposer's own email address. The aim of this is to establish further contacts between the two parties with the objective to work together in the proposal but, in any case, it is a binding compromise between them.

- **Reject:** It will include a standard dismissal text that the proposer will be able to personalise. The contact details of the proposer will not be disclosed and the sender of this email will be the email address of the idealist server. The aim of this is to thank the replying organisation even when they will not be included in the consortium or contacted again. Data corresponding to rejected EoI will not disappear and will always be accessible by the corresponding proposer through his EoI list.

The EoI are – by default – tagged as 'pending', these actions will label each EoI as 'accepted' or 'rejected' to ease the list management.

In those cases when the consortium has been formed but there are EoI still to be replied, the option '**Reply to All Pending EoI**' will facilitate the contact to send a general rejection to every pending EoI thanking them for their interest.

It is important to notice that this accept/reject decision is not binding towards the final intentions of the proposer to include or not a new partner in his consortium. This is only to facilitate an initial contact between the two parts and, in most cases, even when initially

accepted; it will only imply the beginning of a long process of negotiation before the partner is finally accepted.

### 3.2 Amendment and Closure of the Partner Searches

By means of the list of Partner Searches under the folder ‘**Open**’, the proposer can access their own published forms and check their actual contents. In case the proposer wishes to modify the contents of the form (for instance, because the actual profiles have already been covered but they have identified another potential partner needed with a different profile), they can ‘edit’ their PS. This action will automatically forward the PS back to ‘Pending’ Folder. After editing the PS they should contact their National Representative, who will have to re-publish it (with or without a notification to all the members of the network).

When this process is initiated, both NCP and proposer will be forced to make use of the **Communication Tool** provided by the system to clarify the suggestions and changes made in each step. Additionally a phone or email contact between the National Representative and the proposer may be needed to provide further clarifications.

In the event of receiving enough appropriate responses to the Partner Search and completing the consortium, it is recommended to close the search without delay, to avoid further responses and save time both to the proposer and the replying organisations. To do this, the proposer can simply click on the button ‘**Close**’ placed both at the top and the bottom of the form. This will automatically mark the Partner Search as closed on [www.ideal-ist.eu](http://www.ideal-ist.eu) and will delete the ‘Reply to PS’ button that allows interested organisations to reply. The reasons provided for closing a Partner Search form will be either:

- A consortium is being formed, or
- The proposer decided not to go ahead depending on the final status as estimated by the proposer.

This will move the corresponding form to the folder labelled as ‘**Closed**’, where it will still be accessible to the proposer, including the responses received and the Responses Management Tool.

In case the proposer wants to re-open the Partner Search at a later stage (for instance, because one of the partners dropped out at the last minute), they can contact their National Representative, who will be allowed to re-open the Partner Search form and distribute it for a second time.

### 3.3 The Electronic Feedback form

Once a Partner Search is closed, the proposer will have access to a Feedback form where he will provide updated information about the proposal. The most important one will be whether it was finally submitted or not and, in such case, the ID number assigned. Also, information about partners included in the consortium by means of Ideal-ist will be requested. It is recommended to complete this form only after Call deadline when all the previous information is definitive and well known.

Once the form is filled out and sent, this information will be available for statistical purposes, and the proposer will not be asked again.

In case the proposal was not finally submitted, the proposer will not be asked about partners included but reasons for not submitting the proposal.

### **3.4 The PS Search Engine**

Either by means of the option 'PS Search' of the Control Panel (only for registered members) or the 'Search for Specific Partner Searches' of the public web, users will be able to keep track of all the Partner Searches generated in the network that fit a specific set of criteria defined by them, independently of whether they were notified by e-mail or not.

In case no options are specified, all the Partner Searches published until that moment will appear and the users will be able to access all the public details corresponding to the selected Partner Searches and contact the proposer pressing on the 'Reply to PS' button and completing the corresponding Standard Reply Form.

## **4 Statistics**

The automatic retrieval of certain statistics have been introduced in the PS System to allow the NCPs in-depth analysis of research and technological development trends of Calls, Objectives that are more successful than others, country of origin of proposers and potential partners, type of organisations submitting or replying to a PS, experienced versus newcomer using the Idealist service.

The online automatic statistics webpage should provide statistics per Call, per country, per organisation using free search.

### **Proposer Statistics**

The Proposer Statistics provides information for the columns country of origin of proposer, city, type of organisation, How did you find out about us?

### **Partner Search Statistics**

The PS Statistics can be downloaded by selecting in the drop-down list a certain Call, country, type of organisation. PS Statistics comprise information on PS, EoI, Feedback forms and a general overview:

## Statistics

Call	Total PS	Pending	Sent back	Open	Closed	Rejected	Private	Cancelled	EOI
Energy-Efficient Buildings 2011 (FP7-2011-NMP-ENV-ENERGY-ICT-EeB)	10	1	3	0	4	1	0	1	312
Factories of the Future 2011 (FP7-2011-NMP-ICT-FoF)	5	0	2	0	2	0	1	0	243
Future Internet Public Private Partnership (FP7-2011-ICT-FI)	4	2	1	0	1	0	0	0	58
Future Internet Public Private Partnership (FP7-2012-ICT-FI)	0	0	0	0	0	0	0	0	0
ICT call 7 (FP7-ICT-2011-7)	102	6	24	0	40	18	5	9	3150

## APPENDIX 1 – Guidelines how to fill out the PS Form

### Basic Information:

- **Call Identifier:** Options provided by a combo box to all the Calls currently open or published.
- **Objective:** Automatically assigned if only one option is valid for the chosen challenge, otherwise only valid options for the chosen Call and Challenge are given.
- **Funding Schemes:** Automatically assigned if only one option is valid for the Objective chosen, otherwise only valid options for that Objective are provided according to the ICT Work Program.
- **Evaluation Scheme:** Automatically assigned if only one option is valid for the Objective and Funding Scheme chosen, otherwise only valid options are provided.
- **Closure Date:** Automatically assigned when Call, Objective and Evaluation Scheme are chosen.

### Proposal at a Glance:

- **Proposal Name:** The best option to fill this field out should be an Acronym in capital letters followed by its corresponding short explanation, giving a first impression of the aims and objectives of the project.
- **Subject:** Short description of the project aims (3-4 lines). It should clearly and shortly explain what the project pretends to do and hence justify at first sight its adequateness to the ICT Work Program under the chosen Call, Objective and Funding Scheme.

### Project Description:

- **Proposal Outline:** Detailed description of the aims and objectives that the project wants to achieve and the methodology used for it, always avoiding delicate or confidential information (3-4 short paragraphs might be enough). In particular cases a previous description of the state of the art might be useful to justify the steps to be taken by the present project. In those cases where the ICT Work Program establishes any restrictions to the way the expected projects are to be achieved, these aspects should be tackled here.
- **Keywords:** Most representative terms related to the project. It is desirable to use only a few short and clear words that really describe the project, using a comma between them.

### Partner Profile Sought:

- **Required Skills and Expertise:** Short description of the profile(s) needed to develop the project, or general description and experience of the possible partner(s) wanted. The more specific these profiles are, the more accurate the responses will be.
- **Description of the Work to be Carried Out by the Partner(s) Sought:** Short description of the work to be assumed by each one of those profiles once they are involved in the project.
- **Type of Partner(s) Sought:** To be used when specific needs about the type of partners are fundamental for the consortium: Hospitals, Libraries, specific types of SME, partners from specific geographical areas when specified in the Work Program, etc.
- **Please, tick the box if you are looking for a Coordinator, who would coordinate your proposal:** In case the proposing organisation needs another organisation to carry out the coordination of the project once funded, either because they are based on a country unable to coordinate an FP7 project or because they lack the resources or experience to coordinate themselves.

**Your Experience in ICT Project Management:**

These data will be used for internal statistical purposes only, and will not be public on the finally published form:

- **Have you ever participated in an ICT Project before?** Yes/No
- **Have you ever coordinated an ICT Project before?** Yes/No

In the case of small organisations this response will likely be valid for the whole organisation. In the case of big universities, research centres or companies, the statistics will be more valid if these aspects refer to the specific group/department that will be involved in the project.

**Expression of Interest (EoI):**

**Inform a Colleague about received Expression of Interests (EoI):** As all the responses to the published Partner Search will be managed and stored in the Ideal-ist server, and granted to the proposer by means of his own secure area (Personal Home Page), he is given the possibility to indicate the email address(es) of a colleague or colleagues to receive the email notifications of every Expression of Interest generated to that Partner Search. Nevertheless, the Personal Home Page of the proposer should be only accessible to the registered user, and he should not disclose his access data to anyone else.

Finally, the proposer is asked to expressly accept the Ideal-ist Confidentiality Clause before being able to Save and Submit the proposal.

## **APPENDIX 2 – Guidelines to fill out the Standard Reply Form (EoI)**

The Standard Reply Form will be accessible by clicking on the ‘Reply to PS’ button available for every published and open Partner Search in the Ideal-ist web site. The interested organisation will be able to provide comments to some aspects of the original Partner Search related to the profiles needed and the work to be carried out in the project. At the same time, they will be able to access the original information of the Partner Search Form:

### **Your Comments on the specific Partner Search:**

- **Your Comments on the Required Skills and Expertise:** It is important that the Replying Organisation highlights their own skills and expertise when related to those requested in the present Partner Search, identifying themselves with one concrete profile among the different profiles sought, as that will ease the proposer’s decision and will increase their chances to be selected.

- **Your Comments on the Work to be Carried Out by the Partner(s) Sought:** Highlighting the capacity and resources available to carry out the work related to the selected profile, as well as your vision of those tasks and the best way to achieve them. The best way to be selected is being proactive and constructive from the very beginning of your relationship with the proposer.

- **Your Comments on the Type of Partner(s) Sought:** Making sure that your profile matches the specifications needed by the proposer which, in certain specific cases, will be mandatory.

- **Express your interest in coordinating the proposal:** In those cases when the proposer is looking for an experienced coordinator and the replying organisation identifies themselves with that role.

### **Your Experience in ICT Projects:**

- **Experience on EU Programmes, National Programmes and Publications:** It is expected that the replying organisations shortly list here their previous experience in European/National R&D programs when relevant. Also it is very important for those organisations offering as coordinators to justify their Call with a sound background and experience in R&D projects.

- **Tick the box if you have never participated in an IST/ICT Project before:** In the case of small organisations this response will likely be valid for the whole organisation. In the case of big universities, research centres or companies, the proposer will be more interested in these aspects related to the specific group/department that will be involved in the project.

- **Tick the box if you have never coordinated an IST/ICT Project before:** In the case of small organisations this response will likely be valid for the whole organisation. In the case of those big universities, research centres or companies, the proposer will be more interested in these aspects related to the specific group/department that will be involved in the project.

Finally, the replying organisation will be asked for some basic contact data to be used only by the corresponding proposer and expressly accept the Ideal-ist Confidentiality Clause before being able to submit the Expression of Interest.

## Appendix 3 - PS Quality Criteria

In order to clearly record each individual's view of a PS, the QT shall informally use a scoring scheme. Each QT member will add a score to his comments 0-5 with the following meaning:

<i>Score</i>	<i>Meaning</i>	<i>Result</i>
0	Fails on an Objective Criterion and specify which one	Cannot be published even without a QL
1	Fails on a Subjective Criterion - unlikely to be fixable	No QL
2	Fails on a Subjective Criterion - fixable or requires further information	No QL
3	Changes made/substantive comments and recommendations	Can be given a QL
4	Minor comments and/or recommendations	Can be given a QL
5	Fully in line as is - no comments	Can be given a QL

Each QT member can change his score as a result of discussion and/or changes made by the submitter or as a result of further information provided.

### **Objective Reason**

The search is clearly out of scope of the call. An example would be one trying to be used purely as a promotion for the originator with no project content. Another would be for a subject that clearly doesn't match the selected Challenge/Objective such as under an IP for Nano-electronics wishing to set up an on line library dealing with hunger in the third world. There should be no problem with this.

<i>Aspect</i>	<i>Description</i>
1	Is this a real partner search as a coordinator or looking for a coordinator? In particular it must not be someone looking for an opening or consultants looking for clients.
2	Is the call and Challenge/Objective open?
3	Is the specified instrument open for this Challenge/Objective?
4	Does the topic match the Challenge/Objective?
5	Is the PS open for partners from every participating country?
6	If less than ten days to deadline, does the PS comply with D6 below?
7	Is the identity of the proposer given and not that of a third party such as a consultant as per D7 below?

If the answer to any question is no, then the PS should not be published without the correct modification (with or without a Quality Label).

**Subjective Reason**

This is something that appears not be in scope, although it may address the topic superficially. For example for something much too close to the market such as a proposal to develop a product without any innovative aspects but in the domain of the selected Objective. Given that we have some obligation not only to the proposer in not having him waste his time, but also to other potential partners who may expend considerable effort on a proposal found via Ideal-ist that had minimal chance of being accepted. However, we need to protect ourselves by having some authoritative reason for such a rejection.

<i>Aspect</i>	<i>Description</i>
1	Does the proposal outline have correct level of detail? Remember, this is not an evaluation, therefore in depth is not required.
2	Does the proposal description hide key competitive information? Remember competitors could read it, therefore best not to give too much away.
3	Is the idea sufficiently far from market? Remember that normally product development is not allowed.
4	Does the idea address any potential ethical concerns adequately?
5	Is the proposed activity reasonable for the chosen instrument?
6	If research, is the proposed activity innovative? It is not if you are aware of another project already doing this work or of it being commercially available.
7	Is the proposed work within the scope of the ICT Work Program?
8	If research, is the innovation itself in the scope of the Challenge/Objective?
9	Is the centre of gravity of the proposed work within the scope of the Challenge/Objective? Otherwise it could be a better fit to a different Objective that is not open.
10	Does the proposed activity match any available Objective background material? This would include notes obtained from informal meetings with the involved Head of Units or Points of Contact.
11	Do you feel this proposal has a reasonable chance of acceptance?
12	For a Type A, is the proposed coordinator in member or associated state?

If the answer to any question is no, then the PS should not be published with a Quality Label without the correct clarifications and perhaps modification. We shall always publish searches when in doubt i.e. err on the side of the proposer.