# PO Annex template

ITEA Call 2024

## Foreword (*IMPORTANT, READ FIRS*T)

**Do not remove or modify the sections with these notations in any way**

All guidelines in this template appear in this ‘boxed’ format. **These instructions, as well as the preceding title page (“PO Annex template”) and this foreword,** **should never be manually removed from the submitted files**: they are automatically removed by the merging function of the ITEA Community website. Potential layout issues that appear when removing the instructions (e.g. a large image leaving half a page blank) will be adjusted by the ITEA Office between the submission of the proposal and the transfer of the generated PO to the reviewers.

NB: all texts between “<” and “>” symbols (incl. on the front page and in the headers) should be replaced or removed.

It is crucial that proposal writers comply with the pre-defined formatting and styling rules as breaking these may cause the merging process to fail. Please comply with the formatting rules by adhering to the following guidelines:

* **Do not remove any predefined titles and do not add headers, incl. annexes, that are not supposed to be defined according to this template**. Any additional annexes are forbidden: please rely on using footnotes if needed. You are, however, free to add subsections when there is no subsection yet defined (e.g. you can define subsection §2.1.2.1 within §2.1.2 Solution concept).
* Do not modify the predefined styles, except for standard ‘emphasis’ effects (i.e. underlined or bold text).
* Do not remove the instructions (both green and coral) and do not remove the auto-generated sections, incl. the Annexes.
* The proposal size should be less than 10 MB.

It is in the interest of consortia to ensure that a merged document can be generated and downloaded before the submission deadline.

Sections that need to be filled in exclusively via the ITEA Community website will have the following notation in the red box below:

Auto-generated section: input to be provided exclusively on the Community website.

Do not remove or modify the sections with these notations in any way throughout the entire Annex template, as they are needed in order to automatically merge the information provided via the ITEA Community website with your uploaded Annex document.

**Important guidelines for the successful preparation of a PO**

**1) Length and quality of the proposal**

The quality of the writing and the total length of a proposal have an impact on its evaluation by the Public Authorities and the ITEA Steering Group. Please avoid verbose writing and keep the PO or FPP concise and informative. Use bullet points or tables to provide lengthy information in an efficient format.

Section maximum length indicates the maximum length of the PO and FPP for evaluation. The overall length of the final merged document, excluding sections §3.2-3, §4 and Annexes for the PO (in case of FPP excluding sections §4, §5 and Annexes), must not exceed 40 pages for a merged PO. A merged PO that exceeds the maximum length in section §1, §2 and §3.1 can have a negative impact on the evaluation.

Note that the number of words used as specifying the maximum length refer to paragraphs and tables. We encourage the use of figures and graphics to support your text.

**2) The use of Google Docs**

The PO-FPP template cannot be properly copied to Google Docs and re-copied to the original PO-FPP template due to compatibility issues. When using Google Docs, please **only** copy the final “body text per paragraph” from the Google Doc and paste it in the original PO-FPP template.

# Project Outline Annex

<ACRONYM> or <PROJECT NAME>

<FULL PROJECT NAME>

Edited by: <name>

Date: <date>

This document will be treated as strictly confidential unless otherwise specified by the consortium.

Table of contents

[Foreword (*IMPORTANT, READ FIRS*T) 2](#_Toc175838217)

[Project key data 6](#_Toc175838218)

[Project acronyms 7](#_Toc175838219)

[1. One-page project executive summary 8](#_Toc175838220)

[2. Project overview 9](#_Toc175838221)

[2.1. Rationale of the project 9](#_Toc175838222)

[2.1.1. Problem statement 9](#_Toc175838223)

[2.1.2. Solution concept 9](#_Toc175838224)

[2.2. Market impact 10](#_Toc175838225)

[2.2.1. Business outcome 1: <Name of the business outcome> 11](#_Toc175838226)

[2.2.2. Business outcome 2..n (Repeat as necessary) 11](#_Toc175838227)

[2.3. Technological impact 12](#_Toc175838228)

[2.3.1. Technological innovations 12](#_Toc175838229)

[2.3.2. Relationship to other projects 13](#_Toc175838230)

[3. Consortium overview 14](#_Toc175838231)

[3.1. Consortium roles and contributions 14](#_Toc175838232)

[3.2. Partner descriptions 14](#_Toc175838233)

[3.3. Partner specific market access 15](#_Toc175838234)

[4. Rationale for public funding 16](#_Toc175838235)

[Annex A: Summary of costs & effort breakdown 17](#_Toc175838236)

## Project key data

Auto-generated section: input to be provided exclusively on the Community website. Do not edit or remove this box and do not provide any text within this Annex in this chapter.

The inserted key data will contain, for example, the acronym, full title, time frame, respective countries and partners per country, the coordinator and a short description including the project idea, the main expected market impact and the main technological objective(s).

## Project acronyms

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1. One-page project executive summary

**(Maximum length: 500 words)**

Within a maximum of one page, provide a strategic description of your proposed project addressing:

* the problem (e.g. from users/customers) to be solved;
* the business relevance and the target market impact;
* the innovative aspects and the major expected technical outcomes;
* the consortium relevance to reach the ambition (technical and business).

<Text to be inserted here>

1. Project overview
   1. Rationale of the project
      1. Problem statement

**(Maximum length: 1000 words)**

This subsection describes the **relevant context and background to the project** in terms of user needs, technological and market status, not the project itself. It should convince reviewers that the project partners have a good understanding of the context in which they will be evolving regarding demand, technology and business.

**Describe** the **problem** (e.g. from users/customers) that the project aims to solve. Explain the issues, limitations or bottlenecks that currently exist and explain how you plan to address these within the project.

<Text to be inserted here>

* + 1. Solution concept

**(Maximum length: 1500 words)**

In this section, provide a **high-level overview of the technical solution concept** that the project aims to explore and implement to address the identified problems. Present an abstract representation of your targeted solution, using drawings or diagrams to illustrate the main components and their interactions. Identify the key technologies involved, including software, hardware, processes, algorithms, repositories, and meta-models, as well as the interfaces between them. Describe how these technologies are organized to deliver the unique capabilities of the solution concept.

Provide the argumentation on how and why the proposed solution concept will effectively solve the problems. Explain the rationale behind the choice of technologies and their configuration. Discuss the expected benefits and outcomes, and how the solution concept addresses the specific needs and challenges identified earlier. This section should convincingly demonstrate the feasibility and potential impact of the proposed solution.

<Text to be inserted here>

* 1. Market impact

**(Maximum length: 5000 words)**

This subsection should convince reviewers that the **consortium is credible, legitimate and relevant** enough to finally exploit the developed solution in order to generate business. To achieve this, this section should explain the targeted business outcomes of the project. Below are detailed instructions on what to include in each part of this section, **per business outcome**:

**Market Potential and Trends:** Provide a detailed overview of the current market situation and trends. Quantify the market size, growth rate, and potential. Discuss key market drivers, opportunities, and emerging trends. Highlight main competitors, their market positioning, and key products. Include predictions and estimates of future growth from recent studies and reports. This comprehensive analysis should demonstrate a deep understanding of the market landscape.

**Products, Services, or Processes:** Provide a comprehensive description of the developed product, service, or process. Highlight its unique features, capabilities, and functionalities. Explain how it addresses specific market needs or problems. This description should offer a clear understanding of what the product/service/ process entails and its significance in the market.

**Targeted Customers:** Identify the primary customer segments targeted by the solution. Describe their characteristics and needs. Provide insights into who the customers are and why they need the proposed solution.

**Go-to-Market Strategy:** Describe the strategy for introducing the product/service/process to the market. Outline distribution channels, marketing approaches, and sales strategies. Highlight any strategic partnerships or collaborations that will support market entry. This part should detail the practical steps and plans for bringing the solution to market effectively.

**Revenue streams:** If applicable, provide an initial view of potential revenue streams that this business outcome aims to generate. Discuss different revenue models such as subscriptions, licensing, and one-time sales. This initial overview should offer insights into the financial viability and potential profitability of the solution.

**Value Proposition:** Clearly articulate the value that the proposed solution brings to customers and end-users. Identify the particular needs or challenges it addresses. Emphasize the benefits and competitive advantages over current alternatives. This section should make a compelling case for why customers/end-users would prefer this solution over existing options.

**Business KPIs:** Define the key performance indicators (KPIs) that will support the exploitation of the project outcomes and can be achieved during the project. These KPIs should establish clear benchmarks for evaluating the project’s progress towards exploitation success. Each KPI should be clearly defined with target values and a detailed explanation of how it will help evaluate the project's progress towards commercialization success.

Examples of relevant KPIs include: conducting pilots on customer sites, performing technology demonstrations, organizing customer workshops and collecting user feedback, engaging with stakeholders, establishing partnerships and collaborations, developing intellectual property (e.g., filing patents), achieving specific Technology Readiness Levels (TRLs), benchmarking against existing products, conducting training and knowledge transfer sessions.

* + 1. Business outcome 1: <Name of the business outcome>

<Text to be inserted here>

* + 1. Business outcome 2..n (Repeat as necessary)

<Text to be inserted here>

* 1. Technological impact
     1. Technological innovations

**(Maximum length: 5000 words)**

This section should convince reviewers that the consortium 1) has **enough insight** into the technological challenges, 2) proposes **significant breakthroughs** that will bring technological innovations and novelty and 3) has enough **R&D competence**. Each targeted technical innovation should be described comprehensively under the following headings:

**Definition of the Innovation:** Start by clearly defining each targeted technical innovation and its relation to the solution described in section 2.1.2. Describe the innovation in detail, specifying what it is and how it functions. Explain the specific technological challenge it addresses, highlighting the gaps or limitations in current technologies that your innovation aims to overcome. Emphasize the novelty and significance of the innovation, illustrating why it represents a breakthrough in the field. This section should provide a clear understanding of what the innovation entails and its potential impact.

**State of the Art (SotA):** In this subsection, you should convince reviewers that the project partners have a good understanding of the technological background and evolution of the targeted field. Begin by describing the current technological situation in the project’s domain from both industry and academia perspectives. Provide an overview of existing technologies, methodologies, and solutions relevant to your innovation. Discuss key players, major developments, and recent advancements in the field. This section should clearly illustrate the technological SotA and how your project advances beyond it.

**Technological KPIs:** Clearly define the relevant KPIs for each technological innovation. A KPI should include two values: the initial value, which show the current practice or level, and the target value, which is the level targeted to be achieved by the end of the project. Explain how each KPI will be measured and what it signifies for the success of the innovation.

* + - 1. Technological innovation 1: <Title of the innovation>

<Text to be inserted here>

* + - 1. Technological innovation 2..n: (Repeat as necessary)

<Text to be inserted here>

* + 1. Relationship to other projects

**(Maximum length: 1000 words)**

Highlight how your proposed project relates to or differs from other collaborative projects, such as ITEA, H2020, or national ICT clusters. Specify how your proposal builds on the results of these collaborative projects. Include a short description focusing on aspects related to your proposed project, detailing which input modules will be reused from other projects, what will be transferred from your proposal to other projects, or why certain results are not useful for your proposal.

If applicable, provide a table summarizing these relationships. The table should include columns for the project name, a short description, and the relationship. In the relationship column, explain the reuse, transfer, or exclusion of results, clearly illustrating the interconnectedness and differentiation of your project from existing initiatives.

<Text to be inserted here>

Link to related previous and/or current collaborative research projects:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Project name | Collaborative programme | Time period (approx.) | Technical focus | Relationship |
| <ACRONYM> | <e.g. ITEA> | <e.g. 2017–2020> | <Text to be inserted here> | <Text to be inserted here> |
| <ACRONYM> | <e.g. H2020> | <e.g. 2021-?> | <Text to be inserted here> | <Text to be inserted here> |
|  |  |  |  |  |
|  |  |  |  |  |

1. Consortium overview
   1. Consortium roles and contributions

(Maximum length: 2000 words)

This subsection should **illustrate the collaborative effort and synergy** within the consortium, highlighting the strengths and contributions of each partner.Clearly define the roles and responsibilities of each partner in the consortium, specifying if they are use case providers, end users, solution providers, integrators, academia, etc.

Elaborate on each partner’s contribution to achieving the business outcomes and technological innovations. Describe how their expertise and capabilities support the project. Clearly demonstrate how their collaborative efforts will lead to successfully solving the stated problem and implementing the proposed solution.

<Text to be inserted here>

* 1. Partner descriptions

This section will be generated automatically on the basis of input provided on the partner page on the ITEA Community website (ITEA Community website > Projects > Project > Partners > Partner name ).

In addition to contact details and a generic description (incl. type and size of the entity), three specific descriptions per project partner are requested on the website:

* Main contribution
* Strategic importance of the project

The information merged to this section is the partner’s description, organization type, contact person, main contribution, tasks, added value and strategic importance.

Auto-generated section: input to be provided exclusively on the Community website.

* 1. Partner specific market access

This section will be generated automatically on the basis of input provided on the partner page on the ITEA Community website (ITEA Community website > Projects > Project > Partners > Partner name ).

The partner information should only contain elements that are relevant and related to the precise project scope. Avoid generic information about the project partner and provide concrete information on your go to market strategy, as a single partner, with the results of this project.

For companies, focus on business prospects. For universities and research institutes, focus on how the knowledge and technologies will be transferred to products, if needed through third parties (e.g. through open source libraries, knowledge transfer to companies with consulting and/or PhD hiring, IP contracts, start-ups, etc…)

Auto-generated section: input to be provided exclusively on the Community website. Do not edit or remove this box and do not provide any text within this Annex in this chapter.

1. Rationale for public funding

Auto-generated section: input to be provided exclusively on the Community website. Do not edit or remove this box and do not provide any text within this Annex in this chapter, but rather provide the requested information directly on the ITEA Community website.

On the website you must fill out one section per country represented in the consortium. This section should indicate the national coordinator and detail the national rationale for funding. At the end of the national rationale for funding, the national coordinator must indicate the national ICT clusters that the project has contacted and intends to join.

The national rationale for funding has four components:

* National gain: you must explain the benefits for the participating countries, how the country benefits from collaboration with other countries and the risk level of the investment (i.e. why a public incentive is preferred for such investments).
* Return on Investment (RoI): you must explain how the money invested by both Public Authorities (PAs) and companies is expected to generate value, revenue, jobs etc.
* Value creation of the national sub-consortium: if relevant, you must detail the collaboration within the national sub-consortium and how the exchanges between the various participants will be achieved. If you have national use-cases, explain: what they are, how they are organised and how they are linked with other/previous national projects.
* Adequate balance between the national partners (e.g. the ratio of effort as a percentage for academics, SMEs, etc.).

NB: this section is crucial for the national funding agencies to be able to evaluate the chances of funding for the individual partners within the project. Please try to be as concrete as possible.

Furthermore, it is vital that all national coordinators get in touch with their national PAs in order to present them the project, check funding opportunities and ensure that the national consortium is eligible, even in countries that are not part of the ITAC (ITEA Authorities Committee). Beware of eligibility issues at a national level.

For ITAC countries, information on the contact persons is available on the ITEA public website (in the section “Project Calls & Funding / Funding”). For Eureka countries that are not members of the ITAC, the contact persons are National Project Coordinators (NPCs), more information on: http://www.eurekanetwork.org/ and select “Eureka in your country”.

## Annex A: Summary of costs & effort breakdown

Auto-generated section: input to be provided exclusively on the Community website. Do not edit or remove this box and do not provide any text within this Annex in this chapter, but rather provide the requested information directly on the ITEA Community website.

This Annex will contain a comprehensive summary of the costs and effort, providing 1) costs & effort per country per WP (with totals), and 2) costs & effort per partner type. This data is automatically computed on the basis of the detailed figures of costs & effort provided by each partner on the Community website. It is therefore crucial that all partners provide relevant input on both costs & effort.

Detailed costs & effort per partner are provided in the related country perspective section of §3.