# D6.4 Exploitation and Sustainability Plan

## Document details

| | |
|---|---|
| **Project Acronym:** | **NEMESIS** |
| **Project Name:** | **New Educational Model Enabling Social Innovation Skills development** |
| **Project URL:** | **www.nemesis-edu.eu** |
| **Project Type:** | **Innovation Action (IA)** |
| **EU CALL:** | **CO-CREATION-01-2017** |
| **Grant Agreement No.:** | **770348** |
| **Project Start Date:** | **October 2017** |
| **Project End Date:** | **January 2021** |
| **Deliverable:** | **D6.4 Exploitation and Sustainabillity Plan** |
| **Due date of Deliverable:** | **September 30th** |
| **Actual Submission Date:** | **September 30th** |
| **Name of Lead Beneficiary for this deliverable:** | **SEi** |
| **Report Author(s):** | **Jen Wall (SEi), Catherine Brentnall (Ready Unlimited), Cliff Southcombe (SEi)** |
| **Reviewed by:** | **Aristidis Protopsaltis** |
| **Revision:** | **Catherine Brentnall, Jen Wall** |
| **Dissemination Level:** | **Public** |

## Document History

| Version | Date | Comment | Modifications made by |
|---|---|---|---|
| 0.1 | 20/09/19 | First draft | Irene Kalamaki, Fred Verboon, Aristidis Protopsaltis, Clara García Rodríguez |
| 0.2 | 26/09/19 - | Review | Catherine Brentnall, Jen Wall |
| 0.3 | 29/09/19 | Second draft | Catherine Brentnall, Jen Wall |
| 0.4 | 30/09/19 | Final draft | Catherine Brentnall, Jen Wall, Cliff Southcombe, Aristidis Protopsaltis |

**Disclaimer**

Any dissemination of results reflects only the author's view and the European Commission is not responsible for any use that may be made of the information it contains.

**Copyright message**

| Glossary and abbreviations | |
|---|---|
| KMAKEDPDE | The Regional Directorate of Primary and Secondary Education of Central Macedonia |
| SEi | Social Enterprise International |
| SI | Social innovation |
| SIP | Social Innovation Practitioner |
| Social Innovation Education (SIE) | The philosophy, values and skills in the framework as well as the innovative pedagogies, co-creation methodologies, approaches and tools being developed as part of the NEMESIS educational model |
| The NEMESIS educational model | The NEMESIS educational model provides the teaching and learning practices for introducing SIE at schools. |

# Contents

# 1    Introduction

NEMESIS is an H2020 funded project that brings together social innovation (SI) and education with the aim to develop a novel model for empowering students from primary and secondary education to become the changemakers of tomorrow. Its ultimate aim is to generate an educational model that can be sustained and scaled in schools and contribute to societal and policy change. Thus far, the project has been working hard to develop, test and evaluate the model and its underpinning philosophical and theoretical foundations. Schools - and students, and communities - involved in pilot period 1 have demonstrated that they can apply, adapt and benefit from developing NEMESIS. We perceive a strong exploitation potential of the model due to its inclusivity and social benefit to all students. Its social philosophy resonates with educators, teachers, researchers and communities who seek to tackle exclusion and disadvantage and champion the competency development of all children. Schools, parents, policy makers and academics are engaged in considering how to educate students to thrive in uncertain and difficult times and how young people can be empowered to be change makers and actively contribute to a better society. NEMESIS is facilitating powerful personal and community development by involving schools, social innovators and students in the co-creation real life social projects. NEMESIS has raised the profile of Social Innovation Education in participating schools, and enabled teachers to conceptualise and enact it in practice. In turn, this has generated positive outcomes for young people in terms of their emotional, cognitive, behavioural and agentic engagement. The involvement of parents and carers has increased family engagement in school life, enhancing bonding and social engagement. The involvement of community actors and social innovation practitioners has inspired participants towards social change and community participation. Taken together, this offers a social, participatory and empowering educational model which brings together communities and empowers the changemakers of tomorrow. This task exists to secure the sustainability and exploitation of these benefits, and to ensure that results and outcomes of the project continue and are used, within and beyond the project period. This strategy describes the steps that the project consortium will follow to achieve this.

## 1.1 Objective

The main objective of this plan is to lay out the strategy for the sustainability and exploitation of the results generated by the project. The strategy is being constructed in two phases. First, this initial plan provides an outline with regards to actions that the consortia actions will undertake with regards to sustainability and exploitation between months 25 and 38. Then, following this participatory process which secures the involvement and commitment of the consortium of exploitation and sustainability, this deliverable will be updated internally by the project team in month 30. In month 40 D6.5 the communication, exploitation and dissemination report (leader ASOCCE) will provide an overview of the project's communication, dissemination and exploitation activities, synergies and strategic impact for the whole project.

In pilot period 1 and through the evaluation report D5.2 we have learnt of the critical importance of a concise and accessible document to introduce schools to the NEMESIS model. Therefore, as part of our exploitation and sustainability strategy we have produced

an early prototype of D6.6 replication handbook in order that this can be introduced, tested and refined through pilot period 2, leading to a comprehensive and effective exploitable asset to be delivered in month 38.

This approach enables the embedding of sustainability and exploitation actions within the project itself, as well as the co-creation of a common strategy and road map for after the project. This approach is in line with guidance and best practice aiming to: avoid the weakness of planning for sustainability and exploitation at the end of the project, and to maximise    project partners' commitment in the process.[1] Whilst dissemination and communication are closely related to sustainability and exploitation, they have different, but interrelated goals. In the following section, for the purpose of clarity, we will explicate the difference between these activities, and identify the specific purpose of exploitation and sustainability. In the case of NEMESIS, different partners are taking the lead on different elements of these tasks and have responsibility for producing complementary deliverables.

The leader of task 6.4 (exploitation and sustainability strategy) is SEi. FAU, STIMMULI, KMAKEDPDE and ASOCCE will contribute to the design of the exploitation activities while ESHA will inform the design of the overall plan from teachers and school leader's points of view. SEi will liaise with partners via email, online conferencing and at consortium meeting 7.  Communication will be frequent and timely, liaising with partners as a whole group, subgroup or individually as appropriate. This approach will ensure a team effort drawing on the strength of each partner. This plan will be available to the public on the NEMESIS website.

## 1.2  Timeline

This document has been created as a living strategy to ensure that the exploitation and sustainability of the NEMESIS educational model is created through participatory processes involving the input of all partners, therefore maximising involvement and investment.  This document is presented at the beginning of T6.4, a 14-month period whereby SEi will guide activities to ensure the sustainability and exploitation of the project results for partners and countries, as well as agree a common strategy for pan-European exploitation.   The sustainability and exploitation strategy reflects issues and opportunities identified in the recent evaluation report (D 5.2 Evaluation of Pilot Period 1). In particular, given that the sustainability and expansion of the educational model will be, in part, based on its flexibility and replicability, a key action related to this strategy has been the early production of a prototype of the Replication Handbook (D6.6, due in M38). This is the first stop for anyone wishing to implement the NEMESIS model. It provides a concise yet comprehensive guide that aims to support all users. We acknowledge that it cannot relate specifically to the systems of each country so it is designed as a general guide to be used alongside country specific information and support on the NEMESIS SI Open Learning Platform. Its prototyping is a vital step in order to gain feedback and refine it during Pilot Period 2 and therefore create a useable and exploitable asset.

---

[1] Handbook for Dissemination, Exploitation and Sustainability of Educational Projects:
https://www.aidlearn.pt/fls/doc/proj/diva_handbook.pdf

This document should be read alongside other project deliverables, as detailed below:

- D1.5 Engagement and organisational change model v.2

- D4.2 First validation report

- D4.3 Second validation report

- D5.3 Evaluation of Pilot Period 1

- D5.4 Policy recommendations

- D6.2 & 6.3 Dissemination progress reports v.1, 2 and 3

- D6.7 Scaling progress report

- D7.6: Data management and RRI progress report

This strategy lays the groundwork to ensure meaningful participation of partners in the process of working towards sustainability and exploitation. This task will engage consortia to be deeply invested in the sustainability and exploitation of the project, facilitating a common purpose and shared plan, whilst recognising that different partners and countries will have particular issues and opportunities. This document presents an overview of sustainability and exploitation. After receiving partner feedback on this, there will be further development where partners will agree on exploitation targets to be reached and the action partners will take to achieve them. This will take place at consortium meeting 7 after which SEi will issue guidance documents for completion by timely deadlines (see timeline). This plan will be informed by the results of the evaluation of pilot period 1 (D5.2 Evaluation of pilot case results_v1). The outcomes and recommendations for exploitation and sustainability after the end of the project will be presented in D6.5 - the sustainability plan, due in M30.

### 1.3 Exploitation and Sustainability – defining the terms.

It is acknowledged that there is often confusion related to the terms communication, dissemination, sustainability and exploitation. For the sake of clarity, and to distinguish between this task and complementary activity in other parts of the projects, we share definitions of these concepts.[2]

Communication – taking strategic and targeted measures for promoting the action itself and its results to a multitude of audiences, including the media and the public.

Dissemination – the public disclosure of the results by any appropriate means, including by scientific publications in any medium.

---

[2] See Making the Most of your H2020 Project. Boosting the impact of your project through effective communication, dissemination and exploitation: https://www.iprhelpdesk.eu/sites/default/files/EU-IPR-Brochure-Boosting-Impact-C-D-E_0.pdf and DIVA (as before).

Exploitation – The utilisation of results in further research activities other than those covered by the action concerned or in developing, creating and marketing a product or process, or in creating and providing a service, or in standardisation activities.

Sustainability is the capacity of the project to continue its existence and functioning beyond its end. The project results are used and exploited continuously. Sustainability implies use and exploitation of results in the long term. Sustainability may not include every aspect of a project, some results may be maintained, whilst others may not be.

This task is concerned with the final two elements (exploitation and sustainability) but is supported by the first two (communication and dissemination), which are dealt with in other documents. Our belief is that the project and its outcomes will be sustained through an effective exploitation strategy. Sustainability of outcomes has been described as 'difficult to anticipate and describe',[3] whereas the sustainability of products is more tangible. Thus, this strategy is focussed on successful exploitation, which, in turn, will lead to sustainability of the project and its outcomes.

## 2   Sustainability

The main objective of this task is to ensure the sustainability of the suggested educational model beyond the end of the project as well as its expansion and adoption by other schools, public and private, of primary and secondary education as well as by other learning communities.

Exploitation is closely associated with sustainability, in that exploitation activities should ensure that the results of a project are maintained by partners and used by target groups and possibly transferred to other contexts. Exploitation can be split into two components: mainstreaming and multiplication. Mainstreaming means to address decision makers in order to convince them to introduce and take into account the results of a project. Multiplication is more focussed on persuading individual and end users to adopt the products of a project. Usage can be within the partnership and outside, at local, regional, national or European level. Therefore, we identify the following sustainability objectives:

- To raise widespread awareness about the objectives and activities of the project with emphasis on the novel educational programme, among policy makers, decision makers, the research community and other relevant educational stakeholders (mainstreaming) education related stakeholders both in the project pilot countries but also among other locations across Europe;

- To share the results – especially the impact of the educational model on students and teachers – with education leaders and policy makers around

---

[3] Handbook for Dissemination, Exploitation and Sustainability of Educational Projects: https://www.aidlearn.pt/fls/doc/proj/diva_handbook.pdf

Europe with a view to making NEMESIS a reference point for those interested in developing Social Innovation Education (mainstreaming).

- To sustain the project's educational resources and online presence in order to support the replication of the NEMESIS educational model (multiplication).

- To consolidate and extend the project's external network with the engagement of educational institutions but also with social innovators in order to support the scaling up of the NEMESIS educational model (multiplication)[4].

We believe in the strong exploitation potential and scalability of the NEMESIS model due to its flexible and yet powerful approach to engaging young people in positive social change.

Involving target groups in the development of exploitation and sustainability is a critical factor for success. Our target groups are schools, young people, SIPs, parents, local authorities and education providers, local community actors, researchers, other projects and policy makers. Therefore, all partners will be instrumental in analysing and engaging these target groups at country level over the course of task 6.4. Some partners have more expertise and responsibility in certain areas such as ESHA with policy makers and Head Teachers across Europe. Different target groups will have different interests in different exploitable assets which would help sustain the results of the project. Therefore, all partners are involved in the tasks following sections:

## 2.1 Effective dissemination

| Task | What? | Who? | Status? | By when? |
|------|-------|------|---------|----------|
| Conduct concrete and timely dissemination of the project and its results throughout project lifetime and after project end | Partners plan & implement dissemination activities, as captured in D6.2 & D6.3 | All partners | Underway | Ongoing & beyond the life of the project |

## 2.2 Activate networks

| Task | What? | Who? | Status? | By when? |
|------|-------|------|---------|----------|
| Partners mobilise their existing networks to work toward the adoption of NEMESIS by other schools, learning communities and SIPs | Partners contact interested parties and networks to register their interest with the project on the platform<br><br>Partners implement national scaling plans, progress about | All partners | Underway | Ongoing & beyond the life of the project |

---

[4] Bid proposal p.55-56 Section 1-3

| | which, will be reported in D6.7. | | | |
|---|---|---|---|---|

## 2.3  Analyse Target Groups

| Task | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| Understand specific partner and country level opportunities and needs | Co-create and co-analyse information about future beneficiaries, products and targets from partners.<br><br>Target audience specific value propositions for identified products or services (market analysis). | All partners | Underway | M30 |

## 2.4  Refine value proposition

| Task | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| Evolve a strong value proposition that clearly defines and communicates the unique benefits of NEMESIS | Clearly define the benefits NEMESIS generates as compared to other projects (both within schools, regionally and EU projects).<br><br>Review stakeholder analysis and connect benefits of NEMESIS for specific audiences. | All partners | Underway | M30 |

## 2.5  Effective pilot period 2

| Task | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| Ensure sustainability and exploitability through securing school commitment through pilot period 2 | Recruit 30 schools to pilot period 2 in order to further refine & evaluate the model | All partners | Underway | M24 |

## 2.6  Refinement of SI Open Learning Platform

| Task | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| To sustain the SI Open Learning Platform and make it a reference point for SI in Europe | Refine the aesthetic appeal and usability of the platform (task 3.3)<br>Finalise a concrete plan for the sustainability of the platform, including the | ILI-FAU lead, all partners contribute | Underway | Ongoing & beyond the life of the project |

| | resources, staff costs & technical requirements for maintaining the platform | | | |
|---|---|---|---|---|

## 2.7 Effective educational resources

| Task | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| To ensure the use of NEMESIS educational resources, during and beyond the life of the project | Develop and refine appealing, usable & flexible resources.<br><br>Refine resources using feedback from partners and schools during pilot periods 1 and 2 | All partners, pilot period 2 schools | Underway | M40 |

As defined above in activity 2.3 and 2.4, analysing target groups and refining value propositions for different audiences is an activity which will include the whole partnership in a participatory way in order to build and secure commitment. In the next section, we describe the exploitable assets which partners will consider in this analysis.

## 3   Exploitable assets

Although the project has created an educational model for SI skills development that is recommended to be applied as a whole by interested stakeholders, we also recognise the strong exploitation potential of various individual elements of the NEMESIS model that could be sustained and exploited separately. Effective exploitation planning reflects different types of exploitable results[5]: data, knowledge, methods, networks and technologies, for example. Therefore, we provide an initial summary of the types of exploitable results, and the associated asset and value as a foundation to engage partners in considering which are of most relevance to them. This initial list will be updated following input from partners who may identify other opportunities relevant to their organisation or context.

## 3.1   Data

| Type of exploitable result | Exploitable Asset | Value (direct and indirect). |
|---|---|---|
| Data | - Data gathered from teachers before and after training illustrates perceptions and starting points of educators, and | - Illustrates changes, issues and opportunities as perceived by teachers.<br>- Illustrated differences in |

---

[5] Dissemination and Exploitation in Horizon 2020:
https://ec.europa.eu/research/participants/data/ref/h2020/other/events/2017-03-01/8_result-dissemination-exploitation.pdf

| | changes/developments in conceptions of/action towards Social Innovation Education. | existing conceptions between countries. |
|---|---|---|
| Data | - Data gathered for evaluation purposes, before and leading up to the production of pilot period 1 report. | - Captures impact for teachers, students, parents, SIPs. |
| Data | - Data gathered at country level to support the evaluation (for example, videos in schools, interviews by country coordinators or individual partner associates (for example, UK associate Jen Wall is focussing a Master's degree around data gathered from Herringthorpe Junior School). | - Interesting and powerful impact data helps project consortium understand the impact of the model and fine tune approach. <br> - Data can be used in scientific publications. |

## 3.2 Knowledge

| Type of exploitable result | Exploitable Asset | Value (direct and indirect). |
|---|---|---|
| Knowledge | - A definition of Social Innovation Education | - Project Partners have shared understanding of complex concept. <br><br> - Existing Literature around definitions is limited. |
| Knowledge | - A framework for, and philosophical/theoretical underpinning of, Social Innovation Education. | - Project practice has foundation in detailed and justified framework. <br> - A well-grounded framework for SIE in **schools** was not found in initial literature review. <br> - The evaluation report (D5.2) evidences the flexibility of: <br><br> a. SI competence focus |

| | | b. SI competence assessment as schools effectively selected a range of competences to focus on and methods for assessing their development. |
|---|---|---|
| Knowledge | - Teacher training assets | - Enables the professional development of educators wanting to undertake NEMESIS.<br><br>- Enables education and training providers to expand their provision into social innovation education. |
| Knowledge | - Guides on running a Co-Creation Lab, Digital Story Telling, SIP coaching and mentoring, Accessing the Platform. | - Detailed information exists to inform existing and new users. |
| Knowledge | - A replication handbook (prototype released early for pilot period 2). | - Condenses the most important information from across the project into a how to guide for educators. |
| Knowledge | - Refined and tested programme theory for Social Innovation Education model. | - Novel evaluation method to innovating and evaluating the project.<br>- Good understanding of programme mechanisms and processes of change happening in the project. |

## 3.3 Methods

| Type of exploitable result | Exploitable Asset | Value (direct and indirect). |
|---|---|---|
| Methods | - Co-creation methodology – a process has been piloted and is being refined, co-creation methods and activities can be used discretely. | - Enables development of the project by those who not directly involved, but who will read the guide/access the materials. |

| | | - The evaluation report (D5.2) evidences the flexibility of the Lab method as it was effectively used in 3 different ways during pilot period 1. |
|---|---|---|
| Methods | - NEMESIS learning methods - the emergence of a set of core methods which could be exploited as 'NEMESIS through the Curriculum' techniques. | - Enables those not able to execute an entire NEMESIS co-creation project to integrate elements of the philosophy and approach into lesson time. |
| Methods | - NEMESIS Teacher Training assets. | - Enables existing and new participants to deliver training to educators in SIE and the NEMESIS model. |

## 3.4  Networks

| Type of exploitable result | Exploitable Asset | Value (direct and indirect). |
|---|---|---|
| Networks | - The external stakeholders who have become involved in the project (SIPs, Social and Community Actors). | - Increased capacity and potential to promote Social Innovation Education in schools.<br>- New/deeper connections between schools and civic and political life. |
| Networks | - Educators developing Social Innovation Education in schools and colleges. | - New connections between partners in education across 5 countries.<br>- Informal projects evolving between schools. |
| Networks | - Partners/stakeholders in (and beyond), the project exploring collaborations and opportunities. | - Potential to seek further and future projects and opportunities. |

| | Networks | - Language benefits through pen pal links between schools | - Potential for cross-curricular embedding of NEMESIS |
|---|---|---|

## 3.5 Technologies

| Type of exploitable result | Exploitable Asset | Value (direct and indirect). |
|---|---|---|
| Technologies | - NEMESIS Open Learning Platform hosts information, guides and courses to develop the NEMESIS model. The platform will remain open after the duration of the project for at least 3 years and the resources needed will b covered by FAU. | - An online space for existing and new NEMESIS users to share, coordinate and communicate. |
| Technologies | - NEMESIS SI serious Game as part of a PhD degree. | - A serious game that introduces SI to secondary education students. |
| Technologies | - Project website promotes the model, purpose, projects and results. | - Appealing and engaging window into the project, its approach and results. |
| Online courses | - Online course/training in development/MOOC. | - Opportunity to reach/educate at a larger scale. |

The next step to achieve effective exploitation of the assets described above will be through participatory co-creation of specific actions and timings at consortium meeting 7. These will be integrated into this living strategy, which will be updated with all relevant information in M30.

The following section outlines how we will involve partners in the co-creation of effective exploitation and sustainability. We outline critical factors for successful exploitation and actions the consortium will undertake to pursue these.

## 4  Successful Exploitation

Successful exploitation is underpinned by a number of critical factors[6]. We are aligning our activity with these factors, to facilitate the involvement and commitment of partners in the development of successful exploitation.

### 4.1  Secure partner involvement

| Critical Success Factor | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| **Gain partners commitment to the projects results.** | Involve all partners in visioning activity at consortium meeting 7, to agree common vision and cement buy-in. | SEi leading | Preparation underway. | November 2019. |

### 4.2  Agree Responsibilities

| Critical Success Factor | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| **Agree which partners will take responsibility for ensuring sustainability of online channels.** | Plan agreed between partners for maintenance of website, open platform, social media channels. | SEi, FAU, ZEMOS, KMAKEDPDE, ESHA | Underway | November 2019. |

### 4.3  Complete and refine individual Project Exploitation plans

| Critical Success Factor | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| **Complete and refine project exploitation canvas/plans** | Introduce and complete Canvas at Consortium Meeting 7. Use as a tool to | All partners | In preparation. | January 2020. |

---

[6] Handbook for Dissemination, Exploitation and Sustainability of Educational Projects: https://www.aidlearn.pt/fls/doc/proj/diva_handbook.pdf

| | | | | |
|---|---|---|---|---|
| | monitor and refine as project continues. | | | |

## 4.4 Target new beneficiaries

| Critical Success Factor | Related activity | Who? | Status? | By when? |
|---|---|---|---|---|
| **Target new and relevant stakeholders who will become the 'new beginners' and involve new beneficiaries.** | Plan agreed at partner, country and pan-European level to coordinate complementary activities, including synergies creation (task 6.3). | All partners | Underway. | October 2020 |

## 4.5 Make 'agreements of collaboration'

| Critical Success Factor | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| **Make 'agreements of collaboration' with decision makers, associations, institutions, so that results can be applied.** | Identify stakeholders at country and partner level (SEi for example work in Nigeria and France and are in talks with organisations there about how to apply NEMESIS). Develop country/partners plans. Develop pan-European plan. | All. | Underway. | October 2020. |

## 4.6 Develop new opportunities

| Critical Success Factor | Related activity | Who? | Status? | By when? |
|---|---|---|---|---|
| **Pursue the development of new projects and new funding opportunities.** | Opportunity mapping, alignment of expertise and interests and development of partnership understanding agreements. | All partners | Preparation underway. | October 2020. |

## 4.7 Partner commitment

| Critical Success Factor | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| **Reassess and understand partner commitment and usage of project.** | Review commitment and usage of project assets, make decisions about which to sustain or not. | All partners | Underway | October 2020. |

## 4.8 Create relationships with research centres

| Critical Success Factor | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| **Create close relationships with research centres, such as universities and public and private agencies.** | Plans agreed at partner, country and pan-European level to coordinate complimentary activities. | Partners for whom this is relevant. | Underway. | Ongoing, beyond the life of the project |

## 4.9 Create guidelines and recommendations

| Critical Success Factor | What? | Who? | Status? | By when? |
|---|---|---|---|---|
| **Create guidelines and recommendations for exploitation** | Enable new beneficiaries, partners and stakeholders to understand how they can exploit, through clear recommendations and permission to experiment. | SEi | Underway. | November 2020. |

Now we have set out critical factor for successful exploitation we will detail activity towards individual exploitation plans.

## 5 Individual plans

Partners have begun to consider their individual ideas and responses to exploitation. This will lay the groundwork for visioning and development in consortium meeting 7, which will further enhance individual plans and pan-European proposals. The initial questions to partners were as follows:

1) What are the products and services that that have emerged from our work in the NEMESIS project that might be most exploitable in your country?

2) What products or services would you be able to develop and exploit?

3) Who would be key partners at a national level that you think you could work with to develop these products or services?

4) Other comments - including if you have any policy relating to copyright or creative commons.

Partners were advised that they could distinguish between short term and long term plans in their initial responses. Following this initial ideation, partners will be provided with individual exploitation plan templates. They will continue to be involved in monitoring and refining proposals towards exploitation, through their involvement in the tasks stipulated in the preceding sections. Providing this time to partners will help achieve the 'team effort'[7]

---

[7] Handbook for Dissemination, Exploitation and Sustainability of Educational Projects: https://www.aidlearn.pt/fls/doc/proj/diva_handbook.pdf

required for sustainability and exploitation. Partners will have a chance to consider and respond to the action required under the critical success factors in more detail and how they will respond at partner and country level. Individual plans will be submitted by January 2020 and contribute to an effective and co-created approach.

## 6    Sources of funding

The first important step for the consortium will be in consortium meeting 7, to discuss how we perceive the possible continuation of Nemesis, which of its different aspects could be further developed and is there specific activities which need to be undertaken to help schools with Social Innovation Education, or target universities with Social Innovation Education at teachers training level. Given that, Erasmus plus is a programme that provides funding to educational activities and could be an option to explore and pursue. SEi and Stimmuli, during the remaining of the funded project will draw up a matrix identifying potential European funding, appropriateness to the NEMESIS project, resources required to bid and time lines.  This will be managed by a small funding exploitation team lead by these two partners and will draw in other partners where appropriate so that opportunities to further the work of NEMESIS before the end of the funded project are not lost.

Post-funding, the activity will be continued and developed by the voluntary or constituted vehicles set up by the partnership.  Other funding sources such as USAid (America), Dffid (UK) and FDA (France) will be included in the strategy as work with partners such as Education and Solidarity Network and Social Enterprise Academy Nigeria spreads the work of NEMESIS to South America and Africa.

Crowd and community funding are the practice of raising money in small or tiny amounts but from a large number of people, and is becoming more widespread. Whilst it has not yet been actively adopted by NEMESIS, we recognise that many of the proponents of such fund raising, such as the values and principles, are close to those of the NEMESIS partnership. Crowdfunding allows schools in particular to connect and involve the community around them and create a sense of cooperation and involvement where the investment by the donor or small investor is in the benefits being created rather than any financial return. Some schools in the UK have been using Crowdfunding for one off events or projects but it is an activity that NEMESIS could pursue and develop.

SEi    have    been    working    with    a    Social    Licence    Holder    Coops Exchange https://coop.exchange/# who are developing a platform that encourages the poor to save and invest in cooperatives, giving social businesses in disadvantaged communities the investment they need whilst also moving the benefits of investment away from the richest 1% to the poorest. Coops Exchange is gaining a lot of support in the Cooperative and social enterprise movements and with SEi support is also a FairShares company.  SEi will be working with and encouraging Coops Exchange to become more involved in NEMESIS as project and business ideas from schools emerge. Social Investment will be explored, and the experience of the SIPs will be used to see where such investments are relevant or possible. NEMESIS could use this opportunity to challenge some of the top down attitude and practices of such Investors and introduce them into a more co-creative process whereby

they work with schools and young people to identify problems and solutions and how to maximise the social impact of investments.

## 7    Legal issues

### 7.1  Intellectual Property Rights

Intellectual property Rights (IPRs) will be handled in line with the grant agreement and general EC policies regarding ownership, exploitation rights, confidentiality, commercial utilization of results, availability of the information, deliverables etc. to other EU funded projects and disclaiming rules. Specific action will be taken in order to satisfy the basic intellectual property regime that research publication rights will be owned by those who produce the respective results (either employers or employees depending on their country's regime), whereas distribution within the project should be granted for free (decision of non-disclosure should be taken by the consortium with adequate compensation to the partners). The basis for IPR is therefore - in line with Commission policies - the following:

• Background knowledge: all consortium partners will bring in their expertise and knowledge without charging cost and will retain full ownership of the IPR of this expertise and knowledge.

• Foreground knowledge: all newly developed expertise, knowledge and technologies will be owned by the participant(s) in the project that were involved in the development of this specific expertise. In case several participants have jointly carried out work generating foreground and where their respective share of the work cannot be ascertained, they shall have joint ownership of such foreground.

### 7.2  Access and reuse of data.

The right to access and re-use of data will be underpinned by Responsible Research and Innovation (RRI) aspects. The data management and RRI aspects have been outlines in D7.5 Data management and RRI plan.

### 7.3  Open Access to research data

In line with guidance, projects receiving Horizon 2020 funding are required to make sure that any peer-reviewed journal article they publish is openly accessible, free of charge (article 29.2. Model Grant Agreement).

The right to access and reuse digital research data under the terms and conditions is also set out in the Grant Agreement.

For more information: https://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/open-access-data-management/open-access_en.htm

Third parties with the rights to results:
https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf#page=240

These issues will be addressed in collaboration. SEi will liaise closely with ASOCCE and FAU as they have responsibilities for IPR in their work packages, and Valnalón is the project's ethics manager, so will also be closely involved in this.

| Task | What? | Who? | Status? | By when? |
|------|-------|------|---------|----------|
| Create guidance on legal and ethical issues. | Ensure all legal issues are dealt with in detail for presentation in the D6.5. | SEi, FAU, ASOCCE and Valnalon. | Underway. | February 2020. |

## 8    Conclusion – exploitation as a path to sustainability

The strategy set out in this document will facilitate all partners in the active involvement co-creating consortium wide and individual sustainability and exploitation. By taking this 'team effort' approach, we seek to avoid activity stopping at the end of the project and ensure the use of the project's results. Sustainability of EU educational projects has been described as weak and difficult to achieve, but is more likely where consortium partners are motivated, involved and build up a shared sense of ownership. The approach set out in this plan lays the foundations for that, and, provides a pathway to sustainability through exploitation. The benefit of this approach is that we, as a consortium, will be laser focussed on exploitation of the project's results as a route to sustaining its outcomes.