RESOURCES AND FINANCIAL CHALLENGES

KALEIDOS PROJECT

BACKGROUND AND CONTEXT

Securing funding and managing resources are critical steps in the knowledge valorisation process. This session equips researchers and innovators with a strategic overview of the financial landscape surrounding research and innovation (R&I), helping them navigate available mechanisms and anticipate the structural and regulatory challenges.

OBJECTIVE

To familiarise participants with the financial mechanisms available to support R&I activities and innovation-driven projects. The session aimed to help them understand the funding landscape, anticipate common administrative challenges, and build a strategic mindset towards resource planning and proposal development.

TARGET AUDIENCE

- Early-stage researchers and innovation teams
- Project managers and coordinators of R&I projects
- Professionals seeking to scale up innovation projects through public or private funding

METHODOLOGY AND CONTENT

The session followed a structured and informative seminar format, aimed at providing participants with a strategic overview of funding and resource management for innovation and research valorisation. It combined expert input, conceptual explanations, and guided reflection on real institutional challenges.
The content was organised into four interrelated blocks:

1. FUNDING LANDSCAPE MAPPING

Participants were introduced to the main types of funding sources, including public (e.g. Horizon Europe, national and regional programmes), private (e.g. foundations, venture capital, crowdfunding), and hybrid mechanisms. The importance of matching each funding type to the maturity of the innovation was emphasised.

2. FINANCIAL INSTRUMENTS AND PATHWAYS

The session outlined different funding modalities—grants, loans, equity, prizes—and explained their implications in terms of risk, return, and control. Participants learned about project lifecycles, call calendars, and the dynamics of competitive funding.

3. ADMINISTRATIVE AND LEGAL CONSIDERATIONS

The trainer presented typical bureaucratic barriers and regulatory requirements, such as eligibility criteria, grant agreements, reporting obligations, and institutional overheads. The role of support offices (e.g. TTOs, grants offices) was highlighted as essential to success.

4. STRATEGIC PLANNING FOR RESOURCE READINESS

The session concluded with practical advice on long-term funding strategies, including how to build a funding roadmap aligned with Technology Readiness Levels (TRLs), anticipate resource gaps, and combine instruments for different project stages.

The methodology encouraged participants to reflect on their own projects and institutions, fostering awareness of funding ecosystems and the ability to act strategically within them.

MATERIALS NEEDED

- Presentation slides with funding landscapes, process timelines, and financial strategy templates. The slides used during session 9 can be found on the KALEIDOS website.
- Links to EU funding portals (e.g. Horizon Europe, EIC), national fund directories, and private investment sources
- Diagrams illustrating funding types, project stages, and administrative procedures
- Recommended readings on innovation financing and proposal preparation

All materials were compatible with **face-to-face and online formats.**

EXERCISES FOR FACE-TO-FACE AND ONLINE SESSIONS

No structured exercises were conducted, but participants were invited to reflect on:

- What funding options align with their current project stage?
- What administrative or regulatory barriers have they encountered before?
- How could they build a balanced, long-term funding strategy?

This reflective approach encouraged personal mapping of needs and readiness

OUTCOMES OF THE SESSION SKILLS AND COMPETENCES ADDRESSED

This session provided participants with a structured understanding of the financial ecosystem that supports research and innovation projects. By mapping funding sources, financial instruments, and administrative processes, it empowered participants to make informed decisions about funding strategy, resource mobilisation, and institutional coordination.

KEY OUTCOMES

- Clear overview of available public, private, and hybrid funding mechanisms, and their suitability across innovation stages
- Increased awareness of regulatory, administrative, and operational constraints linked to resource management in R&I projects
- Enhanced ability to plan funding strategically, linking project maturity with appropriate instruments and support structures
- Recognition of the role of institutional offices (e.g. TTOs, research services) in enabling successful financing

SKILLS AND COMPETENCES ADDRESSED

The session reinforced several key competences described in the D1.1 KALEIDOS portfolio, including:

- **Mobilise resources** – Central to the session, participants explored how to identify, secure, and manage financial and non-financial resources for innovation projects.
- **Strategic thinking** – The session guided participants in aligning resource strategies with project goals, innovation roadmaps, and impact missions.
- **Decision making** – Participants had to analyse funding opportunities, prioritise financial needs, and assess risks and sustainability.
- **Promote the transfer of knowledge** – Understanding resource mobilisation enables researchers to move ideas beyond the lab into real-world application and use.
- **Increase impact of science on policy and society** – Effective resource planning supports scaling and sustainability of research-based innovations with public value.
- **Systemic thinking** – Participants considered how their projects fit within larger innovation and funding ecosystems, including regional, national, and EU-level instruments.
- **Interact professionally** – The session included how to engage with funders, partners, and support institutions in a clear and credible manner.
- **Valuing sustainability** – Financial strategies were developed with long-term viability and responsible resource use in mind.

- **Practical insights –** The session provided hands-on knowledge about grant design, budgeting, and support structures, building applied financial literacy.

Through this session, participants gained tools and insights to navigate the complex financing environment surrounding knowledge valorisation and innovation within the Open Science paradigm.

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