

Project Deliverable

| | | |
|--------------------------------------|--|---|
| Project Number: 305532 | Project Acronym: Health-2-Market | Project Title: From Health Research to Market - Advanced Services and Training Actions for the IPR Management and Business Exploitation of the EU-funded Research results in Health/life sciences |
|--------------------------------------|--|---|

| | |
|---|--|
| Instrument: COORDINATION AND SUPPORT ACTION | Thematic Priority HEALTH |
|---|--|

| |
|---|
| Title D1.4 RECOMMENDED TRAINING CONCEPT AND PROGRAMME |
|---|

| | |
|--|---|
| Contractual Delivery Date: Month 7 | Actual Delivery Date: Month 7 |
|--|---|

| | |
|--|-----------------------------------|
| Start date of project: September, 1 st 2012 | Duration: 36 months |
|--|-----------------------------------|

| | |
|---|--------------------------------|
| Organisation name of lead contractor for this deliverable: IE UNIVERSITY | Document version: FINAL |
|---|--------------------------------|

| | | |
|---|---|----------|
| Dissemination level (Project co-funded by the European Commission within the Seventh Framework Programme) | | |
| PU | Public | X |
| PP | Restricted to other programme participants (including the Commission) | |
| RE | Restricted to a group defined by the consortium (including the Commission) | |
| CO | Confidential, only for members of the consortium (including the Commission) | |

Abstract :

This document describes the H2M training concept and programme. In this regard, it integrates the inputs from 3 sources (partners, survey and TNA, round tables). Finally, it briefly discusses some specific issues related to the training (e.g., general training topics, dates). More details about these issues will follow in the deliverables of WP2.

Authors (organisations) : IE UNIVERSITY

Agreed by: SKEMA, UGOT, ENGAGE, Q-PLAN, inno TSD

Validated by: Svetlana Klessova, inno TSD

Table of Content

| | |
|---|-----------|
| 1. INTRODUCTION | 1 |
| 2. SUMMARY OF TNA AND ROUNDTABLES INSIGHTS | 2 |
| 3. SUMMARY OF PARTNERS' TRAINING SUGGESTIONS | 4 |
| 3.1. PARTNERS COMPETENCIES | 4 |
| 3.2. SUGGESTED TRAINING TOPICS | 4 |
| 4. OBJECTIVES OF THE TRAINING | 5 |
| 5. TRAINING MODES | 6 |
| 5.1. INTENSIVE TRAINING ACADEMIES | 6 |
| 5.2. TOPIC SPECIFIC SEMINARS | 6 |
| 5.3. E-LEARNING | 6 |
| 5.4. HELPDESK AND ADVANCED SERVICES | 6 |
| 6. TRAINING SPECIFICS | 8 |
| 6.1. WHAT | 8 |
| 6.2. WHERE | 8 |
| 6.3. WHEN | 8 |
| 6.4. HOW | 8 |
| 6.5. TO WHOM | 9 |
| 6.6. BY WHOM | 9 |
| 7. NEXT STEPS | 10 |
| 8. CONCLUSIONS | 11 |

1. INTRODUCTION

In order to maximize the effectiveness of the Health2Market (H2M) training actions, we must combine current business training practices with the specific needs of the training participants. Thus, the H2M training concept and programme combines information gathered from 3 different sources:

- Partners suggestions, based on their experiences and fields of competence,
- the H2M Training Needs Analysis (TNA) which summarizes Health researchers' business/entrepreneurship skills gap to be covered through training, and
- Feedback from the H2M roundtable discussions with researchers and health experts, which has confirmed and enlarged information from the TNA.

As such, the expertise of the consortium partners is best put under the service of the training participants.

The information gathered from partners is presented in this deliverable, whereas that obtained from the survey and the roundtables is presented in the previous deliverables of WP 1 (D1.2 and D1.3). The combination of the information described above resulted to the formulation of specific training objectives, and to the development of the general outline that the training will follow. All these are described in this deliverable. The training will be described in greater detail in the deliverables of WP 2.

2. SUMMARY OF TNA AND ROUNDTABLES INSIGHTS

The Health-2-Market project team has conducted a Training Needs Analysis (TNA), aiming at determining the researchers' actual knowledge and skills in the field of commercial exploitation of research results and to identify their needs for training. The Training Needs Analysis is based on the rationale that, before defining the content of the training action plan, it is necessary to define the needs of the researchers.

In addition, 2 roundtables were conducted with the participation of prospective project participants. The aim of the roundtables was to get some more qualitative insights on the issues that emerged from the TNA.

The **Training Needs Analysis and roundtable discussions have confirmed our initial assumptions** that our main target audience is not homogeneous and that it can be divided into unique cluster groups. These clusters show significant variations in their attitudes and "behaviour" in entrepreneurship/commercialisation activities. The clustering exercise facilitates the targeting process; three of the six segments were selected for targeting namely based on the fact that these 3 groups have expressed interest in training.

Based on the division into cluster segments, we arrived at specific conclusions for the abovementioned clusters, after analyzing in detail:

- ⇒ Their previous experience, competences and skills
- ⇒ Their perception of barriers in terms of obstacles and risks in becoming an entrepreneur
- ⇒ Their skills gap
- ⇒ Their training needs in order to fill the skills gap

The **identified training needs** have been the **ground for recommendations of training concepts**, which have been an important basis for the designing of the Health-2-Market training offer.

The analysis concluded that the **most important aspects** mentioned were related to the following items, with an emphasis on the fact that all should in particular be tuned to the health field:

- ⇒ Financial and market analysis aspects
- ⇒ Business Plan construction
- ⇒ Intellectual Property Rights (for less experienced target groups)
- ⇒ Mentoring
- ⇒ Networking and contacts to experts (venture capitalists, IPR experts, etc.)
- ⇒ Practical training

Overall, the TNA has demonstrated that an important training element should be **"to change the mindset"** of the researchers, in order to make them perceptive for commercial exploitation activities and to give them an "outcome orientation" with regards to financial aspects.

The training offer should **take into consideration the different levels of expertise** identified for the cluster segments, targeting to provide training that may bring them further from their actual stage of knowledge, to becoming active entrepreneurs.

The specifications for particular segments and target groups for the Health-2-Market training offer could concern the training framework (modus, duration, geographical offer, etc.), as well as the concept and content in terms of topics. Overall, researchers seem not to put many conditions with regards to the framework of a training programme – in the contrary to the content. With regards to the Health-2-Market training offer, it is probable that a customisation of training content would be more effective for the seminars (one day seminars on a regional level) as for the week-long academies that are less numerous and planned on a European level. However, the customisation is indeed only useful if a sufficient number of participants coming all from a homogeneous cluster group can be attracted. Otherwise, mixed groups are not considered to be an issue, as long as the training could treat aspects that are of interest to all of them (e.g. regional aspects rather than competence/experience related aspects). In addition, every effort will be made to provide customized training during the implementation phase.

The TNA and roundtable discussions have also provided evidence for general aspects, mostly linked to the process of training:

- ⇒ it is essential to design the training offer with close attention to the expressed needs and to clearly market the benefits that can be expected from the training (return on investment);
- ⇒ practical trainings should be preferred, leaving the opportunity to exchange on best practices, to discuss case studies and personal experiences and to meet/network with experts;
- ⇒ the Health-2-Market training programmes should preview a mixed approach in terms of training mode (online/face-2-face); if sufficient participation can be attracted to a face-to-face training, the approach should be customized with regards to the target, but be flexible in case of mixed participation groups;
- ⇒ The e-learning should be two-fold: part of it should be standalone training, in particular with regards to information that doesn't need interaction with other participants, whereas another part of the modules should be supporting the face-2-face trainings.

For more details on the TNA and the Roundtables insights, refer to deliverables D1.2 and D1.3 respectively.

3. SUMMARY OF PARTNERS' TRAINING SUGGESTIONS

Every partner was asked to provide detailed information on two levels:

- (1) Core competencies and how these competencies fit the specific requirements of the training and how they can be complemented by other competencies
- (2) Training topics, and how these topics might be combined with other topics to meet requirements.

Note that these suggestions were given before acquiring related information from prospective participants. The reason was to be able to obtain unbiased information based exclusively on partners' expertise.

3.1. PARTNERS COMPETENCIES

The consortium partners possess a great variety of competencies that can be helpful in the training process. These can be broadly divided in two categories: Content expertise, and Technical expertise.

Regarding content expertise, the H2M consortium can readily cover issues such as Entrepreneurship, Venture Creation, Business Strategy, Sustainable Development, Innovation, Marketing, Marketing Research, Product Development & Management, Intellectual Asset Management, Technology and Innovation Management, and Design/Implementation/ Auditing of Management Systems.

Regarding technical expertise, the H2M consortium can potentially help training participants with its expertise in EU & nationally funded programmes, start-up support, networking, communication, and development of website and databases.

Finally, even for competencies that cannot be covered internally by the consortium (usually pertaining to very specific health entrepreneurship issues), the partners have established contacts with external trainers that will be able to assist in the respective part of the training.

3.2. SUGGESTED TRAINING TOPICS

Broadly speaking, partners felt that 4 types of topics should be offered. First, topics related to entrepreneurship and new venture creation included obstacles for innovation, valorization types and methods, patents, business plan preparation, financial aspects of entrepreneurship, new venture creation, business planning, etc. Topics related to Intellectual Property Management included obtaining IP rights, patents, IP asset management, ethics, and EU regulations/standards. Topics related to Marketing included new product/service development, market research, market analysis & segmentation and targeting & positioning, and marketing management. Topics related to acquiring specific skills included networking, FP7 issues, communication tools, partner search tools, and proposal writing.

4. OBJECTIVES OF THE TRAINING

Based on the above, and combined with the training needs of the participants (as summarized in previous deliverables), the main objectives of the training will be:

- To fill the business orientation gap of health/life science researchers as identified through the Training Needs Analysis.
- To provide, to the extent possible, training customized to the needs of each participant, a demand that frequently emerged at the roundtables discussion.
- To provide networking opportunities, which were considered as very important by the prospective participants.

To achieve these objectives, the training will focus on issues related to:

- Entrepreneurship and new ventures creation
- Intellectual Property, Innovation Strategies and Ethics
- Market analysis and Marketing.

Further, more specific topics (e.g., networking) may be included in the training curricula in cases in which the training is focused on homogenous groups that will be benefited by such a specialized training.

5. TRAINING MODES

The training will be conducted in four different modes that will run in parallel.

5.1. INTENSIVE TRAINING ACADEMIES

A total of 6 training academies (plus a pilot academy) will be conducted during years 2-3 of the project. Each business school (IE, SKEMA, UGOT) will be responsible for conducting 2 such academies, focused on its area of expertise (New Venture Creation & Marketing, Entrepreneurship & Business Planning, and Intellectual Property, Ethics, & the Utilization of Academic Research-respectively). The academies will last approximately a week, and will cover broad business training issues, and will be targeted to a wide and potentially heterogeneous audience.

5.2. TOPIC SPECIFIC SEMINARS

A total of 15 training academies (plus 1-2 pilot seminars) will be conducted during years 2-3 of the project. Each business school (IE, SKEMA, UGOT) will be responsible for conducting 5 such seminars, focused on its area of expertise. Some initial topics have already been discussed (e.g., Marketing for Innovative Products, Entrepreneurial Finance, IP rights & licensing), but these may change depending on specific demands made by potentially interested homogenous audiences. The seminars will last 1-2 days, and will serve the purpose of customized training (in terms of geography, health research sector, specific topic needs, etc.).

5.3. E-LEARNING

The purpose of the e-learning platform will be 2-fold. First, it will allow interested researchers who were not able to attend physical training because of any reason (e.g., budget and time constraints) to receive some training in the topics they are interested. Second, it will complement the face to face training in the case of participants who want to pursue additional topics, after their initial exposure to the programme.

5.4. HELPDESK AND ADVANCED SERVICES

In addition to the “pure” training services mentioned above, Health-2-Market will also set up additional tools for more specific personal services:

- A “helpdesk”, accessible through the project website through which training participants can have access to expert advice. It will also include a forum of exchange that will be an information exchange tool on the one hand and can also serve as networking tool with other participants on the other hand.
- Advanced Services, being case-specific consulting services on entrepreneurship/commercialization aspects from which selected case may benefit after having gone through a pre-defined selection process.

The purpose of these services would be to provide support to those participants who actively are interested in engaging in entrepreneurial endeavours stemming from their research outcomes. This component of the training aims to provide customized help to participants in the initial steps of their business activities.

6. TRAINING SPECIFICS

6.1. WHAT

Besides the specific training objectives described in the previous sections, an important issue is the degree of customization of the training. Although all partners acknowledge the need to adapt to the health researchers' needs as close as possible, there is also a consensus that designing super-customized training curricula upfront will likely lead to un-fruitful controversies during the training. Thus, a selective customization approach will be followed. The training curricula will follow closely the established business training standards, focusing more on practical discussions and applications. Then, customization will be achieved as needed either during the training with the selection of customized materials (e.g., cases and health related examples), or (if a homogeneous group of participants is covered and demand is sufficient) with designing customized topics-specific seminars. In this case, the seminars could be customized in terms of level of expertise, relevant topics, specific geographical conditions, etc.

6.2. WHERE

The intensive training academies will be conducted at the bases of the three business schools. The topic-specific seminars will be conducted either at the same venues as the academies, or at different venues throughout the EU, wherever sufficient demand for a topic emerges. The training activities will be equally divided among the 3 business schools (IE, SKEMA, and UGOT). The pilot academy will be conducted by SKEMA. There will be an effort that two pilot seminars will be conducted in conjunction with popular events to health researchers. Some initial discussions have been made to have the first pilot seminar conducted by UGOT, in conjunction with the Nordic Life Science Days ("Biopartnering conference") in Sweden, in October 2013. A similar approach will be followed for the second pilot seminar, in case needed, and for the subsequent seminars as well.

6.3. WHEN

The training activities will be equally spaced during the years 2-3 of the project. The pilot academy and seminar will be conducted in September 2013 and October 2013 (tentative) respectively. The idea is to link the seminars to other health events wherever possible, in order to seek for synergies and enlarge the potential audience and also to exploit possibilities of collaboration with other projects/initiatives (such as Fit4Health, contacts with Health NCPs, etc.).

6.4. HOW

A mix of methods will be implemented during the training. The focus will be on more practical methods (case studies, either based on attendee's own project or academic source, workshops, business problem solving, testimonials) versus more theoretical methods (e.g., lectures). The materials will be geared towards Health researchers, to the extent possible. Following common practice of leading business education institutions, the use of specific

materials for each topic will be entirely up to the trainer for that topic. Finally, these methods will be supplemented by the e-training activities (see WP4).

An important part of proposed methodology will consist of the use of **case studies**. The purpose of using cases is to illustrate how business training tools and concepts can be applied in practice.

The feedback obtained from prospective participants as well as from the consortium partners, confirmed that the case-study approach as described in the DOW (task 2.4) is appropriate, with very minor modifications. Specifically, the training will largely use existing case studies, either possessed by the 3 business schools, or acquired from external sources (e.g., MIT's LearningEdge: <https://mitsloan.mit.edu/LearningEdge/Pages/Case-Studies.aspx>).

This content will be customized for the purposes of H2M as needed. In the event that important areas are not covered by the above method, an additional set of case studies will be created. These cases will be based on real life examples that are expected to stem from lead actors' commercialisation-related experiences. We will explore such examples with our (lead actor) entrepreneurs on an as needed basis. All developed case studies will include an analytic "manual" designed to help the instructor who uses the case to get the most teaching value from it.

Cases or links to the cases will be hosted on our web-portal; teaching notes will only be available for registered instructors.

6.5. TO WHOM

The training target groups are health/life science researchers with different levels of expertise and previous commercialisation experience who have expressed interest in training activities. The target groups have been analysed in detail in the TNA - for a detailed description of the target groups please refer to the TNA deliverable.

6.6. BY WHOM

The training will be largely conducted by the three business schools (IE, SKEMA, and UGOT). Other partners will be involved in the training primarily by facilitating the administrative procedures. If needed, other partners along with external coaches will also cover specialized parts of the training (e.g., technical skills).

7. NEXT STEPS

In order to implement the aforementioned training concept, the following deliverables (D) and activities (A) are scheduled:

April 2013: Detailed Training Programme and Schedule (D2.1)

July 2013: Curriculum for topic-specific seminars (D2.2)

July 2013: Curriculum for intensive training academies (D2.3)

August 2013: Initial set of case studies (D2.4)

August 2013: Initial pool of coaches (D2.5)

September 2013: Pilot Academy at SKEMA (A)

October 2013: Pilot Seminar at UGOT (TENTATIVE) (A)

8. CONCLUSIONS

In sum, the integration of the information received from the prospective participants and that received from the partners, confirms that the consortium has the necessary means and expertise to actively engage health researchers to business activities.

Blends of training topics, training modes, trainers, materials, etc. have been developed in order to assure the best possible fit between the proposed training concept and the needs of the target audience. Finally, and importantly, several aspects of developed training remain flexible (e.g., topics and location of the seminars), in order to be able to readily respond to the emerging demands.