



INNOSEE PROJECT

European Commission - Lifelong Learning Programme



RESEARCH DRIVEN CLUSTERS

COMPETENCES FRAMEWORK

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1. INTRODUCTION

1.1 Objectives of the deliverable:

A competence framework can be defined as personal attributes or underlining characteristics, which combined with technical or professional skills, enable the delivery of a role/job or posting. Competencies state the expected areas and levels of performance, tell us what is valued and rewarded.

As indicated in project proposal, partners will create their own language version of the Competence Framework with the content applied commonly by all of them. It will be open to the discussion with stakeholders and partners will seek for possible improvements. After proper finalisation of English version and assurance that it is in line with expectations of all involved partners, national versions of the Competence Framework for research-driven cluster managers will be published.

This deliverable will be available on websites of individual partners as well as project website.

1.2 Methodology

The INNOSEE Competence Framework comprises 9 modules, each of the divided in different sessions with their related core competencies. In this sense all of them have the following components:

Module – as we said, the INNOSEE Competence Framework comprises 9 modules. One introductory module concerning RDC’s Management, and, as agreed following the debates that took place during the second consortium meeting and the workshop held in Thessaloniki, the following 8 modules:

Learning Module	Title
1	RDC Strategic Planning
2	RDC Project Management
3	RDC Market Intelligence
4	RDC Technology Transfer
5	RDC Open Innovation
6	RDC International Networking and Cooperation
7	IPR and Patenting Issues
8	RDC Innovation Funding

Table 1: Learning modules.

Session – each of the different temporary sessions / topics in which a module is divided. For example: Module 2_RDC Strategic Planning is divided in 5 different sessions: strategic analysis, strategic choice, strategic vision, strategic implementation and strategic evaluation.

Competency - is the title or name of the core competencies related to each session. For example: Strategic Analysis has the following competencies related – to understand the external environment, to identify competitive forces and the handling of required and available resources.

Competency Descriptor - is the definition or descriptor statement explaining what the core competency means. For example: Understand the external environment is described as – the capacity to identify and weighty all the external factors that can have an impact on and influence the cluster strategy.

Behavioural Indicators - are examples that indicate how an individual could demonstrate that competency. Behaviour indicators are designed to show what effective performance looks like, it is not an exhaustive list. For example: some of the behavioural indicators for understanding the external environment are - Good knowledge of the social and economic environment in which a cluster operates or Continuously learns and demonstrates an understanding of the competitive environment, trends in the economy, and technology that may impact the business.

2. INNOSEE COMPETENCES FRAMEWORK

M0. RDC Programme Introduction

As introductory module, **M0. RDC Programme Introduction** has no specific competence associated.

M1. RDC Strategic Planning

Session a) Strategic analysis

Competence a.1) To understand the external environment

The capacity to identify and weighty all the external factors that can have an impact on and influence the cluster strategy.

- Good knowledge of the social and economic environment in which a cluster operates
- Continuously learns and demonstrates an understanding of the competitive environment, trends in the economy, and technology that may impact the cluster

Competence a.2) To indentify competitive forces

The capacity to recognise competitive forces operating in the environment.

- Demonstrates how priorities fit into the company's overall strategies
- Understands where the business is going and the strategic objectives of the company and knows how to support them.

Competence a.3) The handling of required and available resources

The capacity to forecast the resources required to ensure a succesful cluster's position in the environment. Identification of the resources available to ensure an effective implementation of the strategy.

- Forecast the resources required to ensure a successful cluster's position in the environment.
- Identification of the resources available to ensure an effective implementation of the strategy.

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Session b) Strategic choice

Competence b.1) To define strategic objectives

The capacity to define strategic objectives that will set an organization's longer-term directions and will guide it in resourcing allocations and means.

- Communicates the company's vision, values, and strategy with conviction.
- Does not give up the long-term vision under present-day pressure; takes a long-term perspective on problems and opportunities facing the organization.

D

Competence b.2) To know opportunities and threats

The capacity to have an accurate knowledge of the internal resources and external influences that will help cluster managers to identify opportunities and define an effective strategy.

At the same time, having an accurate knowledge of the internal weaknesses and the external threats will help cluster managers to avoid setting wrong objectives and taking wrong decisions.

- excellent knowledge on the cluster internal assets and resources and of the external social and economic context.
- excellent knowledge on the internal assets of the cluster and its environment.

Competence b.3) To praise highly different indicators and information

The capacity to set up a set of criteria weighting the importance of the various indicators and information considered in the previous stages.

- anticipates the effect of trends on the business
- engages in scenario planning (e.g., assesses where the organization is today against potential changes/conditions in the external environment) to determine the best path forward.

Session c) Strategic vision

Competence c.1) To set realistic and achievable objectives

The capacity to identify and clearly describe the objectives to be pursued by the cluster

- identify and describe clearly the objectives to be pursued by the cluster.
- pursues challenges that result in long-term business benefit

Competence c.2) To craft the strategy

The capacity to match the cluster's internal capacities, external impacts and strategic objectives.

- match the cluster's internal capacities, external impacts and strategic objectives.
- allocates resources based on strategies and related objectives

Session d) Strategic implementation

Competence d.1) To set up the organisational structures

To set up the organisational structures and process to ensure an effective strategy implementation

- communicates business priorities to all levels of the organization.
- advanced knowledge on cluster management and deep understanding of the cluster internal resources

Competence d.2) To align strategies and leveraging competences

The capacity to identify, describe and integrate the role of each agent in the implementation of the strategy.

- translates company strategies into meaningful plans for the business;

connects them to people's daily work .

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identify, describe and integrate the role of each agent in the implementation of the strategy.

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Session e) Strategic evaluation

Competence e.1) To define a strategy audit

The capacity to define an audit methodology to assess the effectiveness of the strategy implementation

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define an audit methodology to assess the effectiveness of the strategy implementation

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Competence e.2) To develop organisational capabilities assessment

The capacity to evaluate the organisational set up and capabilities of the cluster as well as the resources allocated

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uses information about trends when evaluating alternatives and making decisions.

U

Competence e.3) To take corrective measures

-

the capacity to implement the required corrective measures.

-

implement the required corrective measures

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M2. RDC Project Management

Session a) Starting phase in RDC projects

Competence a.1) *Thinking analytically*

The capacity to identify needs and define actions to change the status quo.

- Understand the needs of stakeholders, customers and RDC members and know the capacities of the institutions involved in the project.
- Develop a project plan with allocation of resources and time.

Competence a.2) *Being creative*

The capacity to use ideas to develop new and innovative products and processes.

- Think out of the box
- Good knowledge and understanding of current and future market and RDC developments.

Competence a.3) *Being persuasive*

The capacity to convince others to commit to the project.

- Have a clear vision about the project and being able to communicate it to RDC members.
- Know the relevant channels to persuade other institutions to contribute to the project.

Session b) Project execution phase in RDC projects

Competence b.1) Planning time and resources

The capacity to make use of available resources in the RDC to execute the project in the given time.

- Knows the resources available in the RDC, make use of it for the implementation of the project and controls it.
- Gives a timeframe for actions to be undertaken and observes, if tasks are fulfilled in time.

Competence b.2) Coping with risks

The capacity to assess risks and to develop and implement optimal strategies to overcome risks.

- Excellent knowledge on all possible risks and the negative impacts of them.
- Excellent knowledge on strategies to prevent risks or to minimize the negative impact of risks.

Competence b.3) Social competence in RDC projects

The capacity to work together in a team of people from different institutions.

- Good knowledge of the project team members.
- Good cooperation with team members, also from different institutions.

**Session c) Project conclusion phase
in RDC projects**

Competence c.1) Handling of defects

The capacity to identify defects and their source and to eliminate these defects

- identify and describe clearly defects of the project results.
- allocate resources to minimize or eliminate the defects

Competence c.2) Analysing the project

The capacity to analyse project results and processes and make use of the analysis results for future projects

- analyse the success of the project regarding the quality of the results and the environmental analysis.
- prepare lessons learnt and learn from experiences in the RDC project.

**Session d) Internal communication
in RDC projects**

Competence d.1) Being a project leader

The capacity to lead the team members

- adapt to different leadership styles, but stay your true self.
- push the project implementation forward.

Competence d.2) Coping with conflicts

The capacity to identify conflicts and solve them in the team.

- identify potential conflicts in the team and develop de-escalation strategies. I
- communicate with people involved in conflicts and mediate between them.. A

**Session e) External communication
in RDC projects**

Competence e.1) Being communicative

The capacity to communicate the project idea and outcomes to people from outside. A

- be able to sell the project top stakeholders and target groups

Competence e.2) Networking

The capacity to develop relationships that will provide great rewards for the RDC in the future

Make use of external channels to maximise RDC project outcomes

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M3. RDC Market Intelligence

Session a) Key concepts of Market Analysis

At the end of this session, the trainee will gain the following competences:

Competence a.1) Recognize the necessity of Market Analysis for the decision making process.

Recognize that find out what's going on in your chosen market is a crucial step for business development of the RDC in order to:

- minimize the risk
- focus the efforts
- maximize the return of investments

Competence a.2) Describe the main concepts, types and approaches to market analysis.

Ability to define market Research, its components, types and list some of the different methods and approached used.

Competence a.3) Match the excellence of a RDC with its market characteristics.

Ability to identify the products inside the RDC which can better respond to the market requests and, on the opposite, signal the problematic productive areas which more need a new market orientation.

Session b) Identifying your positioning and customers

At the end of this session, the trainee will gain the following competences:

Competence b.1) Identify the profile of the RDC or of an innovative company, its reference target, competitors and distribution system.

Ability to analyze a company profile, identify its consumers' groups, their main competitors and retailers.

Competence b.2) Define the positioning on the market in term of consumers' perception.

Ability of segment the reference market, identifying a or RDC's position in terms of consumers' perception, with specific attention on recognizing if it is product oriented or market oriented.

Competence b.3) Recognize the market size e potential growth areas, risks and threats.

Identify the total volume and/or value of all sales for the RDC (number of units of goods purchased, amount spent by customers) and analyze the opportunities in terms of sales increase offered by the market.

Session c) Techniques of Market Research

At the end of this session, the trainee will gain the following competences:

Competence c.1) Effective planning of a Market Research.

Learn how to plan a market research, following different phases, define the objectives, methodologies to be used and expected outcomes.

Competence c.2) Choose the market investigation technique which best responds to the research objectives.

Ability of distinguish between the proposed approached and methods, identifying the best possible solution for his company or

RDC, depending on the purpose of the analysis and the available time/ budget.

Competence c.3) Evaluate and analyze the findings of the research.

Capacity of translate the results of the analysis into useful statistic data, able to guide the future decision making process of the company /RDC.

Session d) Market Analysis implementation

At the end of this session, the trainee will gain the following competences:

Competence d.1) Apply the best practice of the presented case histories.

Learn how to practically set up an analysis of the reference market, starting from the similar experience of other companies/RDC which used market research as a key element of strategic development.

Session e) Market Analysis evaluation

At the end of this session, the trainee will gain the following competences:

Competence e.1) Evaluate the knowledge acquired, the organisational capabilities and the strategic decisions on the issue.

Ability of assess the theoretical and practical competences gained from the module.

Competence e.2) Take corrective measures.

Capacity to identify and implement corrective measures and correlated additional training needs, if necessary.

M4. RDC Technology Transfer

Session a) Technology Transfer Value Chain in RDC

Competence a.1) The capacity to recognize the opportunities for technology transfer and their impact on RDC development.

- Good knowledge of the technology transfer content and possible options of R&D results commercialization

Competence a.2) To identify the major flows of technology transfer in RDC cluster

The capacity to recognise the specific characteristics of technology transfer from academia to business in among business partners in RDC

- Understand the difference in support for technology transfer from the university/public RTO to business and among business partners.

Competence a.3) To manage the development of technology assessment tool

The capacity to develop technology assessment tool that will help to evaluate selected factors

- Identification of key factors for evaluation of the overall potential for academia – industry technology transfer success.

Session b) Technology Audit in RDC

Competence b.1) To define the technology audit content and levels

The capability to outline the major areas for technology and innovation audit

- Define the need for technology and innovation audit.

Competence b.2) To implement technology audit

The capacity to organize the technology audit process by combining internal and external resources.

- Good knowledge on technology audit barriers and possible techniques to overcome them.

Session c) Spin-out Route of Commercialization

Competence c.1) To implement the spin-out option for technology commercialization

The capacity to assess the appropriate routes for research results exploitation through spin-out versus licensing.

- Identify and describe clearly the opportunities for technology commercialization of the IP in the RDC.

- Ability to explore the spin-out route for commercialization.

Competence c.2) To manage the challenges in spin-out development

The capacity to cope with spin-out management, IP pipeline and maintenance of academic motivation.

- Ability to develop code of conduct and to regulate the spin out process

Session d) Licensing in RDC

Competence d.1) To recognize licensing as an option for technology transfer from research to industry

To understand the advantages and limitation of licensing versus spin-out route to commercialization of R&D results in RDC.

- Comprehension of the variety of licensing options.
- Good knowledge on the licensing process

Competence d.2) To comprehend the role of licensing among RDC industrial partners

The capacity to identify opportunities for licensing among RDC partners in the different stages of the technology life-cycle.

- Understand the benefits of B2B licensing in the RDC.

- ability to identify opportunities for licensing outside RDC.

Session e) Technology Transfer Office and RDC

Competence e.1) To define the impact of technology transfer office services on RDC development

The capacity to define the role of technology transfer office services for research exploitation and innovation

- Understand the importance of technology transfer office services

Competence e.2) To develop appropriate structure for technology transfer office

The capacity to assess the advantages and restrictions of different technology office structures.

Ability to analyse the external and internal factors defining the appropriateness of technology transfer office structure

M5. RDC Open Innovation

Session a) Understanding Open Innovation

Competence a.1) To understand the innovation value chain and the concept of open innovation

The capacity to understand the dynamics of the innovation process and management

- understands the innovation value chain from idea generation to market
- understands the rationale of closed – vs- open innovation processes

Competence a.2) To conceptualise the current trends of open innovation

The capacity to understand open innovation processes

- conceptualises the characteristics of open innovation
- understands the added-value and success criteria of open innovation

Competence a.3) To understand applications and strategies of open innovation

The capacity to distinguish different applications of open innovation

- understands user driven innovation
- understands open source, open data and crowdsourcing movements

Session b) Open innovation and Research Driven Clusters

Competence b.1) To understand the concept and typology of clusters and RDC clusters

The capacity to understand the components and relationships within clusters

- define different types of clusters and the respective competitive advantages
- define RDC clusters and their competitive advantage

Competence b.2) To understand open innovation within RDCs

The capacity to understand the competitive forces of opening the innovation in RDCs

- configures the competitiveness model of clusters in open innovation
- configures the extend of openness within its members and outside the cluster

Competence b.3) To be able to build a strategy of open innovation orientation within RDC clusters

The capacity to formulate open innovation oriented thinking in clusters:

- draws policies that overcome short-term orientation in favour of open innovation processes
- aligns future oriented business strategies with open innovation

Session c) Open innovation and Social Media

Competence c.1) To understand the value that social media could offer to the open innovation process

The capacity to understand the role of social media in open innovation

- frames a need for a wide open social media process
- understands how different types of social media could support the open innovation process

Competence c.2) To configure the benefits in RDCs when involving social media in the open innovation process

The capacity to draw benefits in the decision to involve social media in the open innovation process

- identifies benefits in idea generation and feedback loops for the ideas that are being developed.
- identifies benefits derived from new people who can assist in the RDCs innovation efforts

Competence c.3) To understand all forms crowdsourcing in the RDCs open innovation process

The capacity to decide upon using different from of crowdsourcing

- decides upon using different forms of co-creation
- decides upon using different forms of resource sharing

Session d) Open innovation and Living Labs

Competence d.1) To conceptualise the open innovation living lab ecosystem

The capacity to understand the role of living labs in open innovation

- configures living lab's key components and creation conditions
- understands the mutual benefits among stakeholders from living labs

Competence d.2) To configure the mixed model of technological and social innovation in the cooperation of RDCs with living labs

The capacity to visualise the mixed model of open innovation using social resources

- draws the technology adaptation cycle of RDCs using living labs
- draws requirements from demand driven con-current innovation

Competence d.3) To understand the benefits of co-working with users

The capacity to bridge the innovation gap between technology development and the uptake of new products and services

- bridges the users early into the creative process
- allows early assessment of the socio-economic implications of new technological solutions

**Session e) Open Innovation for
Research Driven Clusters: A
roadmap**

Competence e.1) To configure an open
innovation mixture of activities

To relate RDCs needs with available
open innovation resources

- decides upon the open innovation
resources needed for each stage of
the innovation process
- formulates an action plan for
involving open innovation
practices

Competence e.2) To create the RDCs
roadmap for open innovation

To relate stages and RDCs resources
needed in open innovation

- defines the stages of the open
innovation roadmap

- decides upon the inputs and outputs
needed in each roadmap stage

Competence e.3) To create the RDCs
tool base for open innovation D

To choose available tools for
implementing the open innovation
roadmap F

- defines the requirements for the
selection of available open
innovation tools

- selects the available tools for the
implementation of the roadmap

M6. RDC International Networking and Cooperation

Session a) International Technology and Market Foresight

Competency a.1) To understand the international market and technological environment in which the RDC operates;

- determine and describe the basic characteristics of the international environment in which the internationalized RDC operate
- analyze the international environment of the internationalized RDC (e.g. SWOT and PEST analysis)

Competency a. 2) To be able to analyze the effects of the international environment on the development of RDC

- assess how the international environment of the RDC affects the cluster growth, development and profits
- assess how internationalization of the RDC affects their proximity to resources

Session b) RDC internationalization strategy

Competency b.1) To determine the factors that lead to the decisions of the RDC to internationalize;

- to plan, attract and manage the internationally attracted resources

(material, financial, human, and the knowledge as a resource), necessary for the functioning of a successful RDC;

- understand and describe the major factors that lead to the decisions of the RDC to internationalize
- analyze the effects of the major factors, leading to the internationalization of the RDC on the further development of the clusters

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Competency b.2) To understand and adapt to the conditions leading to the decisions of the RDC to internationalize;

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- assess the conditions in which the RDC operate and to outline and explain those of them with highest effect for the development of the RDC
- anticipate and evaluate the effect of the conditions that lead to the decision of the RDC to internationalize and to adapt (as much as possible) the cluster to these conditions (including regulation in some particular sectors, etc.)

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Session c) RDC Networking

Competency c.1) To participate effectively in networking among RDC that are internationalized

- match the cluster resources and capacity with the external resources and capacity of other RDC that have gone international;
- maximize the benefits for RDC from the networking and

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cooperation activities and communicate the successful partnerships and their results to the clusters stakeholders

Competency c.2) To manage networking and cooperation among RDC and other international public and private bodies

- attach the RDC resources and capacity with resources and capacity of other international public and private bodies;
- communicate the successful partnerships and their results to the clusters stakeholders

Session d) Supporting RDC for regional development

Competency d.1) To be able to understand and form regional public-private partnerships with the participation of regional RDC

- number of implemented new regional partnerships with the participation of regional RDC
- number of new products or services, produced for the region by the regional partnerships

Competency d.2) To develop Regions of knowledge, supported by regional RDC

- improved quality and accessibility of regionally important products or services
- number of innovations, generated

by the region as a result of the work of the RDC

Session e) Knowledge intensive services for RDC

Competency e.1) To analyze and select services for the RDC, offered by business incubators

- number of RDC that have used the services, offered by business incubators
- number of new technologies or social innovations, implemented by RDC cluster members as a result of the support of business incubators

Competency e.2) To evaluate the contribution of knowledge intensive services for the RDC, offered by information centers, joint research centers, etc.

- new cluster members added to existing RDC as a result of the information centers support
- number of cluster members that have found new markets for their products (or new markets for the innovations they have generated)
- amount of new investments attracted to the RDC research activities / number of new projects implemented as a result of the information centers support.

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M7. RDC IPR and Patents

Session a) Intellectual assets and properties

Competence a.1) To conduct an IP audit

The capacity to identify and assess intellectual assets and properties of RDC that can have an impact on and influence the cluster strategy.

- creates or updates RDC/member company IP register
- continuously learns and demonstrates an understanding of the RDC intellectual capital

Competence a.2) To organize surveillance and business intelligence based on patent and trademark searches

The capacity to study trends in research and technology development on the basis of patent and trade mark searches.

- demonstrates skills to study RDC environment through patent and trademark searches
- defines trends in research and technology development using patent and trademark data bases.

Competence a.3) To manage and leverage technology and IP to create value

The capacity to create value and to ensure a successful cluster's position managing RDC innovations and intellectual property.

- identifies the elements of RDC intellectual capital available to ensure an effective

implementation of the cluster strategy.

- understands complexity of strategic management of RDC intellectual assets and properties – administrative, judicial and business aspects.

Session b) Tools for intellectual property rights protection in the RDC

C

Competence b.1) To identify strategic value of different tools for intellectual property rights protection

The capacity to compare appropriate tools for intellectual property rights protection.

- communicates the advantages and risks of different IP protection mechanisms.
- takes a long-term perspective on problems and opportunities of IP protection in RDC.

D

Competence b.2) To manage individual, collective and shared intellectual property in RDC

The capacity to have an accurate knowledge of different types of intellectual property and the benefits and risks they provide for effective RDC strategy development and implementation.

- excellent knowledge on options for protecting individual, collective and shared intellectual property in RDC
- to use IP notices appropriately to legal label products, services,

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systems, technologies and web presence

Competence b.3) To apply IPR protection mechanisms in RDC context

The capacity to align available IP protection mechanisms with RDC strategy and its implementation.

- anticipates the effect of different IPR protection mechanisms on RDC strategy and its implementation
- prepares IP for due diligence or valuation

Session c) IPR strategy development

Competence c.1) To align IP policy and IP strategy with RDC strategy

The capacity to match the RDC's intellectual assets and properties, external impacts and strategic objectives.

- identify and describe clearly the IP policy and IP strategy
- pursues IP challenges that result in long-term business benefit to RDC

Competence c.2) To advise IP strategy at cluster, organization, operation and product level

The capacity to match the IP strategy at different levels in the cluster and in relations with partners and competitors.

- coordinates IP strategy development at different management levels in RDC.

- allocates resources based on IP strategy and related objectives

Session d) Choosing the best route for IPR exploitation

Competence d.1) To establish in-house IP policies and procedures for IPR_A exploitation

To set up institutions and policies to ensure an effective IP exploitation

- communicates IP priorities and procedures to all levels of the organization.
- translates IP strategies into meaningful plans for business exploitation

Competence d.2) To put in place supporting services for starting business based on protected research results

The capacity to identify, describe and integrate the role of different agents in support of each stage of business development on protected research and technology results. ^P

- identifies opportunities for IP exploitation through supporting information services
- handles decision factors for selecting appropriate IP exploitation vehicle

Session e) IPR in EU research programmes

C

Competence e.1) To understand and apply principles of protecting intellectual property in joint projects

The capacity to define foreground and background results, generated in joint projects and ways of their protecting during project implementation, dissemination and exploitation of project results

- define methodology to protect intellectual property in joint projects

M8. RDC Innovation Funding

Session a) Getting to know the local innovation funding environment

Competence a.1) To understand local and international innovation trends

- recent trends in innovation performance and competitiveness of the local economy VS. the EU.
- costs and benefits of external financing VS. internal financing of innovation.

Competence a.2) To understand the local innovation governance system

- learn who is responsible for innovation funding within the country;
- who are the key stakeholders in the process of financing innovation, and
- what are the main responsibilities of the key stakeholders.
- get information on national contact

Competence e.2) To ensure project contracts contain appropriate provisions to cover IP

The capacity to evaluate potential conflicts among partners in joint project due to IP issues and to use appropriate contractual arrangements with them. D

- anticipates and avoids conflicts and litigation with competitors, partners and employees, concerning IP points for various funding programs.
- get a systematic view over the sources of innovation funding and applying for innovation funding locally.

Competence a.3) Be aware of the latest national innovation policy developments and key proposals for the future

- get to know the key objectives of the national innovation policy and how the government is trying to achieve them
- learn the latest recent policy developments and proposals
- get more information on the innovation policy events in the RDC financing area. L

Session b) Raise awareness of the EU programs for financing RDC innovation W

Apart from learning the national innovation priorities in the previous sessions, in this module RDC representatives complete their understanding of the EU financing opportunities. Thus, they get additional G

information on the sources of innovation funding and applying for innovation funding internationally.

Competence b.1.) Building a systematic overview of the EU programs for innovation funding, their key objectives and their operation.

- Managers know the key programs for financing RDC innovation
- Detailing the key requirements for obtaining EU financing under the various innovation programs
- Managers know the goals of the programs and know how to position a proposal within the goals of the program

Competence b.2.) Seeking partnerships within and across the RDC for an easier access to EU innovation funding.

- Describes the importance of building partnerships to obtain innovation funding.
- Teaches how to look for potential partnerships abroad and build proposals.

Competence b.3.) Obtaining further information on funding programs.

- Exercises contacting the national contact points and making them help with a consulting service on a proposal.
- Researching the Programs websites and trying to justify and position a specific proposal within the goals of the program.

Session c) Venture capital and Private equity funding for innovation

Securing substantial funding is a key factor to delivering high growth and innovation within the RDC. There are a number of ways to fund innovation start-up or growth through innovation, by using external funding such as loans^M or equity finance. Equity financing includes formal and informal investment from business angels,^D Venture Capital (VC) or Private Equity (PE) funds. In a competitive free market perspective RDC members need to better understand how to attract^M investors and to know what the investment process is all about in order to allocate their scarce resources to their best possible alternatives.

Competence c.1.) Understanding formal vs. informal risk capital financing of the RDCs

- Business angels vs. VC and PE^D funding. Shared experiences by venture capitalists.
- Screening for potentially attractive^T innovation projects in an EU perspective.
- An RDC manager is recorded delivering his or her experience with VC or PE funding.

Competence c.2.) Understanding RDC innovation funding opportunities - European Investment Fund (EIF) perspective

- Getting acquainted to EIF^B intermediaries.
- Understanding equity products:

Technology transfer & Venture Capital.

- co-investment with Business Angels: European Angels Fund.
- ezzanine and PE operations alternatives.

Competence c.3.) Understanding the investment process

- generation of leads, pipeline projects. Sell-side vs. buy-side perspective.
- building skills to understand evaluation of investment opportunities. Valuation.
- understanding negotiations and investment approval stages.
- understanding company portfolio monitoring and exiting strategies.

Session d) Learning from good practices in RDC innovation funding

RDC members need to obtain a hands-on information on how others obtained financing and commercialized their successful ideas. This session gives the

road map to a successful innovation: from the core idea generation through obtaining financing to the commercialization of the good practice.

Competence d.1.) Mobilizing internal sources of funding

- ses experience from another RDC to learn how it mobilized its internal resources to fund innovation.

G

Competence d.2.) Using national sources of funding

- ses experience from another RDC to learn how it used national innovation programs to fund innovation.

B

U

Competence d.3.) Using international and EU sources of funding

- nvolving RDC members with EU Programs and international funding programs experience to deliver advice on their success story

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3. SUMMARY TABLES

M1. RDC Strategic Planning	SESSION	COMPETENCE	INDICATOR
	1.A) Strategic analysis	1.A1) To understand the external environment	1. A1.a) Good knowledge of the social and economic environment in which a cluster operates
	1.A2) To identify competitive forces	1. A2.a) Demonstrates how priorities fit into the company's overall strategies	1. A2.b) Understands where the business is going and the strategic objectives of the company and knows how to support them.
	1.A3) The handling of required and available resources	1. A3.a) Forecast the resources required to ensure a successful cluster's position in the environment.	1. A3.b) Identification of the resources available to ensure an effective implementation of the strategy
1.B) Strategic choice	1.B1) To define strategic objectives	1. B1.a) Communicates the company's vision, values, and strategy with conviction.	1. B1.b) Does not give up the long-term vision under present-day pressure; takes a long-term perspective on problems and opportunities facing the organization.
	1.B2) To know opportunities and threats	1. B2.a) Excellent knowledge on the cluster internal assets and resources and of the external social and economic context.	1. B2.b) Excellent knowledge on the internal assets of the cluster and its environment.
	1.B3) To praise highly different indicators and information	1. B3.a) Anticipates the effect of trends on the business	1. B3.b) Engages in scenario planning (e.g., assesses where the organization is today against potential changes/conditions in the external environment) to determine the best path forward.

MI. RDC Strategic Planning	SESSION	COMPETENCE	INDICATOR
	1.C) Strategic vision	1.C1) To set realistic and achievable objectives	1. C1.a) Identify and describe clearly the objectives to be pursued by the cluster.
			1. C1.b) Pursues challenges that result in long-term business benefit
		1.C2) To craft the strategy	1. C2.a) Match the cluster's internal capacities , external impacts and strategic objectives.
			1. C2.b) Allocates resources based on strategies and related objectives
	1.D) Strategic implementation	1.D1) To set up the organisational structures	1. D1. a) Communicates business priorities to all levels of the organization.
			1. D1. B)Advanced knowledge on cluster management and deep understanding of the cluster internal resources
		1.D2) To align strategies and leveraging competences	1. D2.a) Translates company strategies into meaningful plans for the business; connects them to people's daily work.
			1. D2.b) Identify, describe and integrate the role of each agent in the implementation of the strategy.
	1.E) Strategic evaluation	1.E1) To define a strategy audit	1. E1.a) Define an audit methodology to assess the effectiveness of the strategy implementation
1.E2) To develop organisational capabilities assessment		1. E2.a) Uses information about trends when evaluating alternatives and making decisions	
1.E3) To take corrective measures		1. E3.a) Implement the required corrective measures	

M2. RDC Project management	SESSION	COMPETENCE	INDICATOR
	2.A) Starting phase in RDC projects	2.A1) Thinking analytically	2. A1.a) Understands the needs of customers, stakeholders and RDC members and knows the capacities of the institutions involved
			2. A1.b) Develop a project plan with allocation of resources and time
		2.A2) Being creative	2. A2.a) Thinking out of the box.
			2. A2.b) Good knowledge and understanding of current future market and RDC developments.
		2.A3) Being persuasive	2. A3.a) Having a clear vision about the project and being able to communicate it to RDC members
			2. A3.b) Knowing the relevant channels to persuade other institutions to contribute to the project.
	2.B) Project implementation phase	2.B1) Planning time and resources	2. B1.a) Knows the resources available in the RDC, make use of it for the implementation of the project and controls it..
			2. B1.b) Gives a timeframe for actions to be undertaken and observes, if tasks are fulfilled in time.
		2.B2) Coping with risks	2. B2.a) Excellent knowledge on all possible risks and the negative impacts of them.
2. B2.b) Excellent knowledge on strategies to prevent the risks to be happened and to minimize the negative impact if occurring.			
2.B3) Social competence		2. B3.a) good knowledge of project team members	
		2. B3.b) Good cooperation with team members.	

M2. RDC Project management	SESSION	COMPETENCE	INDICATOR
	2.C) Project conclusion phase in RDC projects	2.C1) Handling of deficits	2. C1.a) Identify and describe clearly defects of the project results.
			2. C1.b) Allocate resources to minimize or eliminate defects
		2.C2) Analysing the project	2. C2.a) Analyse the success of the project regarding the quality of the results and the environmental analysis.
			2. C2.b) Prepare lessons learnt and learn from the experiences in the RDC project.
	2.D) Internal communication in RDC projects	2 .D1) Being a project leader	2. D1.a) Adapt to different leadership styles, but stay your true self.
			2. D1. b) Push the project implementation forward.
		2.D2) Coping with conflicts	2. D2.a) Identify potential conflicts in the team and develop de-escalation strategies.
			2. D2.b) Communicate with people involved in team conflicts and mediate between them.
	2.E) External communication in RDC projects	2.E1) Being communicative	1. E1.a) Be able to sell the project to stakeholder and target groups
2.E2) Networking		1. E2.a) Create and sustain a network of stakeholders of the project	

M3. RDC Market Intelligence	SESSION	COMPETENCE	INDICATOR
	3.A) Key concepts of Market Analysis	3.A1) Recognize the necessity of Market Analysis for the decision making process.	3. A1.1) Demonstrates the understanding of the importance of market investigation to minimize the risk, focus the efforts and maximize the return of investments
		3.A2) Describe the main concepts, types and approaches to market analysis.	3. A2.a) Ability to define market Research, its components, types and list some of the different methods and approached used.
		3.A3) Match the excellence of a RDC with its market characteristics.	3. A3.a) Ability to identify the products inside the RDC which can better respond to the market requests and, on the opposite, signal the problematic productive areas which more need a new market orientation.
	3.B) Identifying your positioning and customers	3.B1) Identify the profile of the RDC or of an innovative company, its reference target, competitors and distribution system.	3. B1.a) Ability to analyze a company profile, identify its consumers' groups, their main competitors and retailers.
		3.B2) Define the positioning on the market in term of consumers' perception.	3. B2.a) Ability of segment the reference market, identifying a or RDC's position in terms of consumers' perception, with specific attention on recognizing if it is product oriented or market oriented.
		3.B3) Recognize the market size e potential growth areas, risks and threats.	3. B3.a) Able to identify the total volume and/or value of all sales for the RDC (number of units of goods purchased, amount spent by customers)
3. B3.b) Capacity of analyzing the opportunities in terms of sales increase offered by the market.			

M3. RDC Market Intelligence	SESSION	COMPETENCE	INDICATOR
	3.C) Techniques of Market Research	3.C1) Effective planning of a Market Research.	3. C1.a) Knows how to effectively plan a market research with its different phases, define the objectives, methodologies to be used and expected outcomes.
		3.C2) Choose the market investigation technique which best responds to the research objectives.	3. C2.a) Ability of distinguish between the proposed approached and methods, identifying the best possible solution for his company or RDC, depending on the purpose of the analysis and the available time/ budget.
		3.C3) Evaluate and analyze the findings of the research.	3. C3.a) Capacity of translate the results of the analysis into useful statistic data, able to guide the future decision making process of the company /RDC.
	3. C3.b) Able to write a clear and effective final report on the research's outcomes..		
	3.D) Market Analysis implementation	3.D1) Apply the best practice of the presented case histories.	3. D1.a) Learn how to practically set up an analysis of the reference market, starting form the similar experience of other companies/RDC which used market research as a key element of strategic development.
			3. D2.b) Identify, describe and integrate the role of each agent in the implementation of the market analysis.
	3.E) Market Analysis evaluation	3.E1) Evaluate the knowledge acquired, the organisational capabilities and the strategic decisions on the issue.	3. E1.a) Ability of assess the theoretical and practical competences gained.
		3.E2) Take corrective measures.	3. E2.a) Capacity to identify and implement corrective measures and correlated additional training needs, if necessary.

M4.RDC Technology Transfer	SESSION	COMPETENCE	INDICATOR
	4.A) Technology Transfer Value Chain in RDC	4.A1) To understand the technology transfer benefits and limitations	4.A1.a) Good knowledge of the technology transfer content and possible options of R&D results commercialization
		4.A2) To identify the major flows of technology transfer in RDC cluster	4.A2.a) Understand the difference in support for technology transfer from the university/public RTO to business and among business partners
		4.A3) To manage the development of technology assessment tool	4.A3.a) Identification of key factors for evaluation of the overall potential for academia – industry technology transfer success
	4.B) Technology Audit in RDC	4.B1) To define the technology audit content and levels	4.B1.a) Define the need for technology and innovation audit.
		4.B2) To implement technology audit	4.B2.a) Good knowledge on technology audit barriers and possible techniques to overcome them
	4.C) Spin-out Route of Commercialization	4.C1) To implement the spin-out option for technology commercialization	4.C1.a) Identify and describe clearly the opportunities for technology commercialization of the IP in the RDC.
			4.C1.b) Ability to explore the spin-out route for commercialization.
		4.C2) To manage the challenges in spin-out development	4.C2.a) Ability to develop code of conduct and to regulate the spin out process
	4.D) Licensing in RDC	4. D1) To recognize licensing as an option for technology transfer from research to industry	4.D1.a)Comprehension of the variety of licensing options.
4.D1.b) Good knowledge on the licensing process			
4 D 2) To comprehend the role of licensing among RDC industrial partners		4 D2.a)Understand the benefits of B2B licensing in the RDC	
		4 D2.b) Ability to identify opportunities for licensing outside RDC.	

	4.E) Technology Transfer Office and RDC	4.E1) To define the impact of technology transfer office services on RDC development	4.E1.a) Understand the importance of technology transfer office services
		4.E2) To develop appropriate structure for technology transfer office	4.E2.a) Ability to analyse the external and internal factors defining the appropriateness of technology transfer office structure

M5. RDC Open Innovation	SESSION	COMPETENCE	INDICATOR
	5.A) Understanding Open Innovation	5.A1) To understand the innovation value chain and the concept of open innovation	5.A1.a) Understands the innovation value chain from idea generation to market
			5.A1.b) Understands the rationale of closed – vs- open innovation processes
		5.A2) To conceptualise the current trends of open innovation	5.A2.a) Conceptualises the characteristics of open innovation
			5.A.2.b) Understands the added-value and success criteria of open innovation
		5.A3) To understand applications and strategies of open innovation	5.A3.a) Understand user driven innovation
			5.A3.b) Understands the added-value and success criteria of open innovation
	5.B) Open innovation and Research Driven Clusters	5.B1) To understand the concept and typology of clusters and RDC clusters	5.B1.a) Define different types of clusters and the respective competitive advantages
			5.B1.b) Define RDC clusters and their competitive advantage
		5.B2) To understand open innovation within RDCs	5.B2.a) Configures the competitiveness model of clusters in open innovation
5.B2.b) Configures the extend of openness within its members and outside the cluster			
5.B3) To be able to build a strategy of open innovation orientation within RDC clusters		5.B3.a) Draws policies that overcome short-term orientation in favour of open innovation processes	
		5.B3.b) Aligns future oriented business strategies with open innovation	
5.C) Open innovation and Social	5.C1) To understand the value that	5.C1.a) Frames a need for a wide open social media process	

	Media	social media could offer to the open innovation process	5.C1.b) Understands how different types of social media could support the open innovation process
		5.C2) To configure the benefits in RDCs when involving social media in the open innovation process	5.C2.a) Identifies benefits in idea generation and feedback loops for the ideas that are being developed.
			5.C2.b) Identifies benefits derived from new people who can assist in the RDCs innovation efforts
	5.C3) To understand all forms crowdsourcing in the RDCs open innovation process	5.C3.a) Decides upon using different forms of co-creation	
		5.C3.b) Decides upon using different forms of resource sharing	
	5.D) Open innovation and living labs	5.D1) To conceptualise the open innovation living lab ecosystem	5.D1.a) Configures living lab's key components and creation conditions
			5.D1.b) Understands the mutual benefits among stakeholders from living labs
		5.D2) To configure the mixed model of technological and social innovation in the cooperation of RDCs with living labs	5.D2.a) Draws the technology adaptation cycle of RDCs using living labs
			5.D2.b) Draws requirements for demand driven con-current innovation
		5.D3) To understand the benefits of co-working with users	5.D3.a) Bridges the users early into the creative process
5.D3.b) Allows early assessment of the socio-economic implications of new technological solutions			
5.E) Open Innovation for Research Driven Clusters: A roadmap	5.E1) To configure an open innovation mixture of activities	5.E1.a) Decides upon the open innovation resources needed for each stage of the innovation process	
		5.E1.b) Formulates an action plan for involving open innovation practices	
	5.E2) To create the RDCs roadmap for open innovation	5.E2.a) Defines the stages of the open innovation roadmap	
		5.E2.b) Decides upon the inputs and outputs needed in each roadmap stage	

		5.E3) To decide upon the RDCs tool base for open innovation	5.E3.a) Defines the requirements for the selection of available open innovation tools
			5.E3.b) Selects the available tools for the implementation of the roadmap

M6. RDC International Networking and Cooperation	SESSION	COMPETENCE	INDICATOR
	6.A) International Technology and Market Foresight	6.A.1) To understand the international market and technological environment in which the RDC operates;	6.A.1.a) Determine and describe the basic characteristics of the international environment in which the internationalized RDC operate
			6.A.1.b) Analyze the international environment of the internationalized RDC (e.g. SWOT and PEST analysis)
		6.A.2) To be able to analyze the effects of the international environment on the development of RDC	6.A.2.a) Assess how the international environment of the RDC affects the cluster growth, development and profits
			6.A.2.b) Asses how internationalization of the RDC affects their proximity to resources
	6.B) RDC internationalization strategy	6.B.1) To determine the factors that lead to the decisions of the RDC to internationalize;	6.B.1.a) To plan, attract and manage the internationally attracted resources (material, financial, human, and the knowledge as a resource), necessary for the functioning of a successful RDC;
			6.B.1.b) Understand and describe the major factors that lead to the decisions of the RDC to internationalize
			6.B.1.c) Analyze the effects of the major factors, leading to the internationalization of the RDC on the further development of the clusters
		6.B.2) To understand and adapt to the conditions leading to the decisions of the RDC to internationalize	6.B.2.a) Assess the conditions in which the RDC operate and to outline and explain those of them with highest effect for the development of the RDC
			6.B.2.b) Anticipate and evaluate the effect of the conditions that lead to the decision of the RDC to internationalize and to adapt (as much as possible) the cluster to these conditions (including regulation in some particular sectors, etc.)
6.C) RDC Networking	6.C.1) To participate effectively in networking among RDC that are internationalized	6.C.1.a) Match the cluster resources and capacity with the external resources and capacity of other RDC that have gone international;	
		6.C.1.b) Maximize the benefits for RDC from the networking and cooperation activities and communicate the successful partnerships and their results to the clusters stakeholders	
	6.C.2) To manage networking and cooperation among RDC and other international public and private bodies	6.C.2.a) Match the RDC resources and capacity with resources and capacity of other international public and private bodies;	
		6.C.2.b) Communicate the successful partnerships and their results to the clusters stakeholders	
6.D) Supporting RDC	6.D.1) To be able to understand and	6.D.1.a) Number of implemented new regional partnerships with the participation of	

	for regional development	form regional public-private partnerships with the participation of regional RDC	regional RDC
			6.D.1.b) Number of new products or services, produced for the region by the regional partnerships
		6.D.2) To develop Regions of knowledge, supported by regional RDC	6.D.2.a) Improved quality and accessibility of regionally important products or services
			6.D.2.b) Number of innovations, generated by the region as a result of the work of the RDC
	6.E) Knowledge intensive services for RDC	6.E.1) To analyze and select services for the RDC, offered by business incubators	6.E.1.a) Number of RDC that have used the services, offered by business incubators
			6.E.1.b) Number of new technologies or social innovations, implemented by RDC cluster members as a result of the support of business incubators
		6.E.2) To evaluate the contribution of knowledge intensive services for the RDC, offered by information centers, joint research centers, etc.	6.E.2.a) New cluster members added to existing RDC as a result of the information centers support
			6.E.2.b) Number of cluster members that have found new markets for their products (or new markets for the innovations they have generated)
6.E.2.c) Amount of new investments attracted to the RDC research activities / number of new projects implemented as a result of the information centers support			

M7. RDC IPR and Patents	SESSION	COMPETENCE	INDICATOR
	7.A) Intellectual assets and properties	7.A1) To conduct an IP audit	7.A1.a) Creates or updates RDC/member company IP register
			7.A1.b) Continuously learns and demonstrates an understanding of the RDC intellectual capital
		7.A2) To organize surveillance and business intelligence based on patent and trademark searches	7.A2.a) Demonstrates skills to study RDC environment through patent and trademark searches
			7.A2.b) Defines trends in research and technology development using patent and trademark data bases.
		7.A3) To manage and leverage technology and IP to create value	7.A3.a) Identifies the elements of RDC intellectual capital available to ensure an effective implementation of the cluster strategy.
			7.A3.b) Understands complexity of strategic management of RDC intellectual assets and properties – administrative, judicial and business aspects.
	7.B) Tools for intellectual property rights protection in the RDC	7.B1) To identify strategic value of different tools for intellectual property rights protection	7.B1.a) Communicates the advantages and risks of different IP protection mechanisms.
			7.B1.b) Takes a long-term perspective on problems and opportunities of IP protection in RDC
		7.B2) To manage individual, collective and shared intellectual property in RDC	7.B2.a) Excellent knowledge on options for protecting individual, collective and shared intellectual property in RDC
7.B2.b) To use IP notices appropriately to legal label products, services, systems, technologies and web presence			
7.B3) To apply IPR protection mechanisms in RDC context		7.B3.a) Anticipates the effect of different IPR protection mechanisms on RDC strategy and its implementation	
		7.B3.b) Prepares IP for due diligence or valuation	
7.C) IPR strategy development	7.C1) To align IP policy and IP strategy with RDC strategy	7.C1.a) Identify and describe clearly the IP policy and IP strategy	
		7.C1.b) Pursues IP challenges that result in long-term business benefit to RDC	

		7.C2) To advise IP strategy at cluster, organization, operation and product level	7.C2.a) Coordinates IP strategy development at different management levels in RDC	
			7.C2.b) Allocates resources based on IP strategy and related objectives	
	7.D) Choosing the best route for IPR exploitation	7.D1) To establish in-house IP policies and procedures for IPR exploitation		7.D1.a) Communicates IP priorities and procedures to all levels of the organization
				7.D1.b).Translates IP strategies into meaningful plans for business exploitation
		7.D2) To put in place supporting services for starting business based on protected research results		7.D2.a) Identifies opportunities for IP exploitation through supporting information services
				7.D2.b) Handles decision factors for selecting appropriate IP exploitation vehicle
	7.E) IPR in EU research programmes	7.E1) To understand and apply principles of protecting intellectual property in joint projects		7.E1.a) Defines methodology to protect intellectual property in joint projects
		7.E2) To ensure project contracts contain appropriate provisions to cover IP		7.E2.a) Anticipates and avoids conflicts and litigation with competitors, partners and employees, concerning IP

M8. RDC Innovation Funding		SESSION	COMPETENCE	INDICATOR
		8.A) The local innovation funding environment	8.A1) Know local and international innovation trends	8. A1.a) Know the recent trends in innovation performance and competitiveness of the local economy VS. the EU
8.A2) Understand the local innovation governance system	8. A2.a) Learn who is responsible for innovation funding within the country			
	8. A2.b) Be able to tell who are the key stakeholders in the process of financing innovation			
	8. A2.c) Know the main responsibilities of the key stakeholders.			
	8. A2.d) Get information on national contact points for various funding programs			
	8. A2.e) Get a systematic view over the sources of innovation funding and applying for innovation funding locally			
8.A3) Be aware of the latest national innovation policy developments and key proposals for the future	8. A3.a) Get to know the key objectives of the national innovation policy and how the government is trying to achieve them			
	8. A3.b) Learn the latest recent policy developments and proposals			
	8. A3.c) Get more information on the innovation policy events in the RDC financing area			
8.B) The EU programs for financing RDC innovation	8.B1) Get a systematic overview of the EU programs for innovation funding		8. B1.a) Managers know the key programs for financing RDC innovation	
			8. B1.b) Knowing the key requirements for obtaining EU financing under the various innovation programs	
			8. B1.c) Know the goals of the programs and know how to position a proposal within the goals of the program	
	8.B2) Seek partnerships within and across the RDC for an easier access to EU innovation finding	8. B2.a) Describes the importance of building partnerships to obtain innovation funding		
		8. B2.b) Teaches how to look for potential partnerships abroad and build proposals		
	8.B3) Obtain further information on funding programs	8. B3.a) Exercises contacting the national contact points and making them help with a consulting service on a proposal		
		8. B3.b) Browsing the programs websites and trying to justify and position a specific proposal within the goals of the program		

	8.C) Venture capital and Private equity funding for innovation	8.C1) Understanding formal vs. informal risk capital financing of the RDCs	8.C1.a) Distinguishing between business angels vs. Venture Capital (VC) and Private Equity (PE) funding opportunities.
			8.C1.b) Screening for potentially attractive innovation projects in a EU perspective - building a screening matrix.
			8.C1.c) Knowing shared experiences - other RDCs' managers experiences with VC or PE financing.
		8.C2) Understanding RDC innovation funding opportunities - European Investment Fund (EIF) perspective	8.C2.a) Acquaintance with EIF intermediaries
			8.C2.b) Understanding equity products: Technology transfer & Venture Capital through browsing the EIF website.
			8.C2.c) Knowledge of the European Angels Fund activities
			8.C2.d) Awareness of the advantages and disadvantages of mezzanine and PE operations alternatives
		8.C3) Understanding the investment process	8.C3.a) Discern generations of pipeline projects and thinking from the Sell-side vs. Buy-side perspective
			8.C3.b) Understanding evaluation of investment opportunities
			8.C3.c) Understanding negotiations and investment approval stages
			8.C3.d) Building company portfolio monitoring and exiting strategies
		8.D) Learning from good practices in RDC innovation funding	8.D1) Mobilizing internal sources of funding
	8.D1.b) Use of experience from another RDC manager to learn how it mobilized its internal resources to fund innovation		
	8.D2) Using national sources of funding		8.D2.a) Use of experience from another RDC manager to learn how the cluster used national innovation programs to fund innovation
	8.D3) Using international and EU sources of funding		8.D3.a) Involvement of an RDC member with EU Programs and international funding programs experience to deliver advice on their success story
8.D4) Using venture capital, angel investors, and crowdfunding	8.D4.a) Listening to a talk by a venture capitalist or an angel investor with information on how to sell a project to them		
	8.D4.b) A good knowledge of how other RDC managers got experience with venture		

			capital firms, or with angel investors, or with crowdfunding
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