| | |
|---|---|
| Project Title | Intellectual Asset Management for Research and Entrepreneurship |
| Project Acronym | IAM4RE.eu |
| Grant Agreement No. | 101206372 |
| Start Date of Project | 01.04.2025 |
| Duration of Project | 24 months |
| Project Website | www.iam4re.eu |

# D2.1 - Map and analysis of current best practices and training materials in KV and Standardisation, based on key projects and successful implementations

| | |
|---|---|
| Work Package | **WP2, Development of contents & tools on KV and Stand** |
| Lead Author (Org) | **Claire Fritz (EURICE)** |
| Contributing Author(s) (Org) | **Lucija Rogina (RISE), Ivana Mijatovic (UBFON), Hana Kosova (ASTP), Sara Martos (ASTP), Jörg Scherer (EURICE)** |
| Due Date | **31.07.2025** |
| Date | **30.07.2025** |
| Version | **V1.0** |

Dissemination Level

| | |
|---|---|
| X | PU: Public |
| | PP: Restricted to other programme participants (including the Commission) |
| | RE: Restricted to a group specified by the consortium (including the Commission) |
| | CO: Confidential, only for members of the consortium (including the Commission) |

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# Versioning and contribution history

| Version | Date | Author | Notes |
|---|---|---|---|
| 0.1 | 12.06.2025 | Claire Fritz (EURICE) | Doc structure |
| 0.2 | 14.06.2025 | Lucija Rogina (RISE) | Title adaptions |
| 0.2 | 23.07.2025 | Hana Kosova (ASTP) | WP1 Input received |
| 0.3 | 25.07.2025 | Claire Fritz (EURICE) | pre-final Draft |
| 1.0 | 30.07.2025 | Claire Fritz (EURICE) | Final Document |



The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# Table of Contents




The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# Figures and captions

## *Charts*



## *Tables*




The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# Glossary of Terms and Abbreviations

| Terminology / Acronym | Description |
|---|---|
| AcI | Academic Institution |
| ANEC | European Consumer Voice in Standardisation |
| ASTP | Association of European Science and Technology Professionals |
| CEETNOVA | Cross-border Entrepreneurship and Technology Transfer (Nova Region) |
| CEN | European Committee for Standardisation |
| CENELEC | European Committee for Electrotechnical Standardization |
| CODAU | Conference of University General Directors in Italy |
| CSA | Coordination and Support Action |
| DIN | Deutsches Institut für Normung (German Institute for Standardisation) |
| EC | European Commission |
| ECOS | Environmental Coalition on Standards |
| EFIS Centre | European Future Innovation System Centre |
| EIC | European Innovation Council |
| ERA | European Research Area |
| ERIC | European Research Infrastructure Consortium |
| ETSI | European Telecommunications Standards Institute |
| GA | Grant Agreement |
| HEI | Higher Education Institution |
| IA | Intellectual Asset |
| IAM4RE | Intellectual Asset Management for Research and Entrepreneurship |
| ICT | Information and Communication Technologies |
| IGLO | Informal Group of RTD Liaison Offices |
| IP | Intellectual Property |
| IRL | Innovation Readiness Level |
| ISO | International Organization for Standardisation |
| JRC | Joint Research Centre |
| KPI | Key Performance Indicator |
| KTO | Knowledge Transfer Office |
| MOOC | Massive Open Online Course |
| NCP | National Contact Point |
| PRO | Public Research Organisation |
| PSF | Policy Support Facility |
| RRI | Responsible Research and Innovation |
| RSO | Research Organisation |
| RTO | Research and Technology Organisation |
| SSH | Social Sciences and Humanities |
| TTO | Technology Transfer Office |

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 0. Executive Summary

This deliverable (D2.1) presents the results of **Task 2.1** under **Work Package 2 (WP2)** of the IAM4RE.eu project. It combines a **structured mapping of training best practices** in **Knowledge Valorisation (KV)** and **Standardisation** with a **triangulated needs analysis** to inform the development of IAM4RE's training contents and tools. The analysis draws on desk research, expert interviews, and institutional insights to identify persistent gaps, emerging opportunities, and design requirements for WP2 outputs. Findings reveal that while awareness of the importance of knowledge valorisation and standardisation is growing—driven by evolving EU policy priorities—training provision remains fragmented, with limited institutional embedding and a lack of sustained funding for scalable or long-term capacity-building formats, particularly in the area of standardisation. Standardisation is still rarely addressed in existing training landscapes, despite its increasing relevance for innovation uptake, interoperability, and research impact.

A curated set of **30 training practices** was classified along key dimensions, including target group, institutional context, and thematic focus. This was complemented by **eight expert interviews** with professionals from public research organisations (PROs), higher education institutions (HEIs), Academic Institutions (AcIs), standardisation bodies, and innovation support services. These interviews provided qualitative depth, validated the selection of good practices, and uncovered underreported needs.

**Key Takeaways:**

- **Standardisation remains a blind spot** in training ecosystems, with very few offers targeting researchers, support staff, or early-stage innovators.
- Training efforts are often **siloed**, with limited progression between levels (e.g. from researchers to TTOs to management) and weak institutional embedding.
- **Interdisciplinary valorisation**, especially in the social sciences and humanities (SSH), is still underserved and often reduced to IP basics or dissemination advice.
- **Train-the-Trainer and progression-based formats** are rare, limiting scalability and institutional learning.
- **Existing EU-funded tools** such as KTH IRL, Zoom4EU, and HSBooster have strong reuse potential but require adaptation, localisation, and better integration into institutional strategies.
- **Policy-aligned initiatives** such as REVALORISE+, CEETNOVA, or the Codes of Practice on IA and Standardisation offer valuable reference points—but uptake remains limited due to awareness, access, and resource constraints.

These findings directly guide the **content development activities** under WP2, which will include the design of a **modular Training Suite**, a **MOOC**, a **Train-the-Trainer Programme**, innovative **service formats** and complementary **support tools**. The actual co-creation, piloting, and validation of these formats will take place in subsequent work packages (**WP3** for training and **WP4** for mentoring), but their design is firmly grounded in the evidence base established through D2.1.

By anchoring its training scheme in a robust analysis of existing practice and unmet needs, IAM4RE ensures that its outputs are:

- **Evidence-based**, reflecting real-world user contexts and institutional diversity;
- **Policy-aligned**, supporting implementation of the **ERA Policy Agenda**, **Codes of Practice**, and **EU Standardisation Strategy**;
- **Fit-for-purpose**, targeting researchers, TTOs, and multiprofessional actors across diverse sectors and maturity levels.

D2.1 thus provides a strategic foundation for IAM4RE's mission: to build capacity for impact-driven, standardisation-aware knowledge valorisation in Europe's R&I ecosystems.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 1. Introduction

This deliverable (D2.1) presents the outcomes of Task 2.1 of the IAM4RE project, focused on **collecting best practice examples in the areas of Knowledge Valorisation (KV) and Standardisation and analysing training needs**. The objective is to provide a robust **evidence base** for the co-creation and development of innovative, **fit-for-purpose training offers** that support institutions and professionals in navigating the increasingly complex landscape of research impact, intellectual asset management, and standardisation.

As the EU research and innovation **policy framework** evolves, so too do the skills and competencies required to translate knowledge into societal and economic value. The IAM4RE project addresses this challenge by **building capacity within Higher Education Institutions (HEIs), Public Research Organisations (PROs), and associated innovation actors**. This deliverable serves as the first stepping stone in that process. It offers an in-depth exploration of current practices and a structured mapping of needs, designed to inform all further content and tool development activities within WP2.

Building on the **WP1 Landscape Analysis**, which revealed the fragmented and uneven provision of KV and standardisation training across Europe, this deliverable **triangulates** findings from **expert interviews**, **stakeholder consultations**, and a curated set of **30 training practices**. The result is a comprehensive picture of what exists, what works, and what is missing. Specific attention was paid to the needs of research support staff, knowledge and technology transfer professionals, and innovation managers—key multipliers in their institutions' **valorisation ecosystems**.

These findings underpin the entire logic of WP2. They inform the design of the modular IAM4RE **Training Suite** (Task 2.2), the development of a **MOOC** focused on entrepreneurship and KV/standardisation (Task 2.3), a **Train-the-Trainer Programme** to foster local anchoring and scalability (Task 2.4), and a **set of new institutional service offers** that respond to unmet needs (Task 2.5). The training formats proposed are aligned with **EU policy priorities** such as the **Codes of Practice** on Intellectual Assets and Standardisation, the **ERA Policy Agenda**, and the **Standardisation Strategy**.

The report is structured around **four main phases**: **conceptual and methodological framing**; **data collection** through desk research and **expert interviews**; **synthesis and clustering of good practices**; and an **assessment of strategic gaps and opportunities**. In addition to the main findings, it includes an integrated **training content map** and outlines the **next steps** for content development and tool design within WP2. A detailed annex provides supporting material such as the expert interview guide, training practice matrix, and anonymised interview notes.

In sum, this deliverable contributes to positioning IAM4RE as a strategic enabler of institutional change, equipping actors across the research and innovation landscape with the tools and knowledge needed to enhance the valorisation and standardisation of research outcomes.

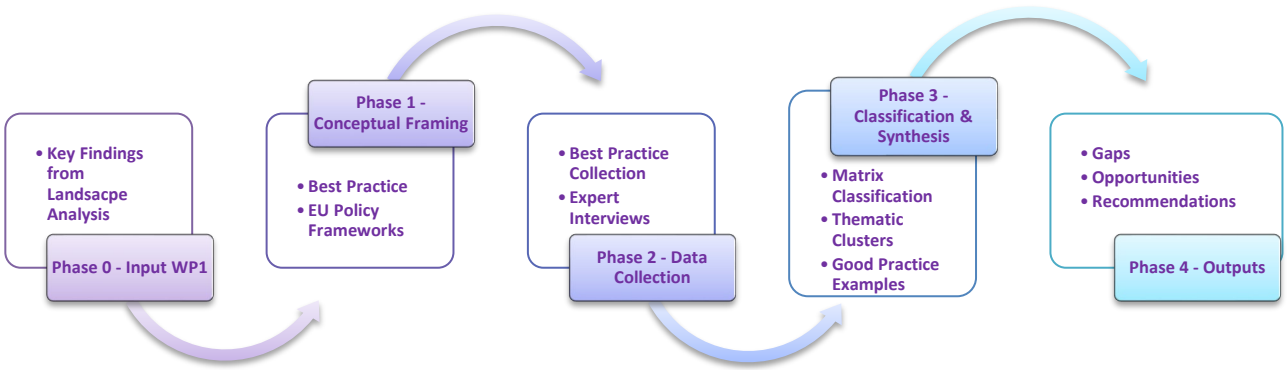


Chart 1 – IAM4RE Four-Phase Mapping Logic

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 2. Methodology and criteria for the selection of the Best Practices

## *2.1. Objective of the Methodology*

The objective of this methodological framework is to ensure a transparent, systematic, and policy-aligned approach to identifying, evaluating, and selecting best practices and training materials in the areas of Knowledge Valorisation (KV) and Standardisation. These practices serve as the empirical foundation for Deliverable D2.1 and underpin the development of tools, training modules, and services within WP2. The methodology is explicitly designed to build on the findings of WP1, in particular Task 1.1 (Landscape Analysis), and to respond to identified needs and gaps in intellectual asset (IA) management capacity across PROs, HEIs and AcIs.

## *2.2. Methodological Framework*

The methodology is structured into four main phases, combining realist evaluation principles, qualitative content analysis, and benchmarking techniques. Each phase corresponds to a specific step in the identification, framing, and selection of best practices.

### *2.2.1. Phase 0: Input from WP1 Landscape Analysis*

The methodology for identifying best practices was informed by the insights developed under WP1. In particular, Task 1.1—*Landscape analysis showing gaps and most relevant needs of the target groups to enable identification of the scope of the training and service resources to be developed*—provided key input through a stakeholder survey that mapped existing support structures and highlighted unmet needs in Knowledge Valorisation (KV) and Standardisation across Europe.

This initial landscape analysis revealed three key challenge areas:

- Persistent **skills gaps** among researchers and support staff, particularly in relation to IP strategy, standardisation pathways, and impact planning;
- **Institutional barriers** such as fragmented support structures, weak incentives, and the absence of integrated workflows;
- A pronounced **disconnect between IP management and standardisation**, with both typically addressed in isolation rather than as complementary elements of valorisation.

These findings directly informed the design and prioritisation of WP2 activities, specifically:

- The thematic scope and selection criteria for the best practice mapping;
- The profile of expert interviewees and stakeholder types targeted for engagement;
- The identification of priority learning domains for capacity-building interventions.

By anchoring the data collection process in the real needs and structural gaps identified through WP1, the best practice methodology in WP2 ensures strategic continuity and responsiveness. It positions WP2 as a downstream, action-oriented response mechanism within the IAM4RE intervention logic—one that addresses the gaps and opportunities surfaced by the landscape assessment.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

### 2.2.2. Phase 1: Conceptual Framing

The conceptual framing of this methodology was guided by the need to define what constitutes a ***"best practice"*** in the **context of IAM4RE**—particularly within the domains of Knowledge Valorisation and Standardisation. This framing ensures that the practices selected are not only practically effective but also strategically aligned with European research and innovation policy priorities.

To that end, we drew on a **set of key EU policy frameworks and strategic documents**, which served both as **normative guidance** and as **reference points for assessing the relevance**, **policy alignment**, and innovation potential of training activities and resources.

**Strategic and Policy Documents Consulted**

| Policy / Strategy Document | IAM4RE Relevance | Year |
|---|---|---|
| Council Recommendation on the Guiding Principles for Knowledge Valorisation | Establishes the core definition of valorisation and key enablers shaping IAM4RE training objectives | 2022 |
| Codes of Practice on Intellectual Assets and Standardisation | Normative benchmarks; guide selection and design of training formats that operationalise the Codes | 2023 |
| ERA Policy Agenda | Anchors IAM4RE in key ERA priorities such as skills development, careers, and institutional transformation | 2022–24 |
| EU Standardisation Strategy | Informs the integration of standardisation in IAM4RE's R&I training tools and valorisation pathways | 2022 |
| European Strategy for Universities | Supports IAM4RE's focus on empowering HEIs as innovation actors through valorisation-aligned training | 2022 |
| ERA Strategic Plan | Provides the forward-looking policy context for institutional reform and Open Science valorisation | 2025–27 |
| European Skills Agenda | Justifies modular and accessible formats, aligned with user roles and institutional stages | 2020 |
| RM-Roadmap and CARDEA | Shapes IAM4RE's training offers for research managers and institutional capacity-building | Various |
| CoARA Agreement on Reforming Research Assessment | Underpins IAM4RE's emphasis on impact, engagement, and non-traditional intellectual assets | 2022 |
| HEInnovate Framework | Guides classification of training needs and readiness of entrepreneurial HEIs | Ongoing |
| JRC Report: Standardisation in Knowledge Valorisation | Provides conceptual guidance for integrating standardisation into the valorisation pipeline | 2023 |
| Mutual Learning Exercise (MLE) & Policy Support Facility (PSF) | Offers validated practices and peer models to inform IAM4RE's content and capacity-building logic | 2023–24 |
| Horizon Europe Strategic Plan & Horizon Dashboard | Supports selection of transferable practices and high-impact EU-funded resources | 2021–24 |

Table 1 - Strategic and Policy Documents Consulted

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

**Definition of Best Practice**

The general definition of a *best practice* used in this context builds on the standards set out in the **EU Best Practice Portal**:

*"A best practice is a relevant intervention implemented in a real-world setting, which has been favourably assessed in terms of effectiveness, efficiency, equity, and sustainability, and that demonstrates transferability across contexts."*[1]

This definition rests on the following principles:

- **Implementation**: Practices must be applied in real-world contexts, not just theoretical or planned.
- **Evidence-based Evaluation**: Practices should demonstrate positive impact, effectiveness, or uptake.
- **Transferability**: Clear context descriptions and documentation allow reuse in other settings.
- **Equity and Sustainability**: Practices should support inclusive and lasting capacity building.

**Definition of Best Practice in the Context of IAM4RE**

Within the IAM4RE project, a *best practice* is understood as a **documented and transferable training activity, tool, or resource** that demonstrably contributes to enhancing the capacity of **researchers, research support staff, or institutional actors** in the areas of **Knowledge Valorisation and/or Standardisation**.

A practice is considered "best" when it:

- Aligns with **identified needs** and **systemic gaps** in the capacity landscape (as mapped in WP1);
- Demonstrates **successful implementation**, **user engagement**, or **positive learning outcomes**;
- Can be **replicated or adapted** in different institutional or national contexts;
- Shows **coherence with EU strategic frameworks**, including the **Guiding Principles for Knowledge Valorisation**, the **ERA Policy Agenda**, and the **EU Standardisation Strategy**;
- Supports the goals of **inclusive, impact-oriented**, and **policy-aligned** capacity development.

Importantly, this definition is **not limited to large-scale or institutionalised programmes**. Targeted interventions, experimental formats, and niche initiatives may also qualify, provided they demonstrate **quality, relevance**, and **potential for reuse** in the IAM4RE context.

**Selection Dimensions**

The conceptual framework further established a set of **evaluation dimensions** used to guide the selection and classification of best practices:

- **Effectiveness** – demonstrable results or user uptake
- **Scalability** – potential for adaptation or broader application
- **Sustainability** – likelihood of continued use beyond initial funding
- **Policy Alignment** – fit with EU valorisation and standardisation policies
- **Innovativeness** – novelty in format, tools, or delivery

[1] *Source: EU Best Practice Portal – https://webgate.ec.europa.eu/dyna/bp-portal/*

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

- **Inclusiveness** – support for diverse actors and institutional types

Together, these criteria ensured that the identification and analysis of best practices in IAM4RE was **empirically grounded**, **strategically aligned**, and responsive to the evolving needs of the European research and innovation ecosystem.

### *2.2.3. Phase 2: Data Collection*

The data collection phase drew on both systematic desk research and targeted expert engagement. A structured catalogue of best practice examples was compiled to capture the diversity of formats, target groups, and content focus across Europe. The objective was to identify both mature, scalable training offers and innovative formats that could inform the development of IAM4RE training resources.

**Data Collection Methods:**

The collection process was guided by the conceptual framework established in Phase 1 and structured to ensure comparability and relevance. Key activities included:

- Structured extraction of publicly available training materials, workshop descriptions, online modules, and toolkits from project portals, institutional repositories, and standardisation platforms
- Targeted expert interviews from PROs and TTOs (see Section 4.3)
- Internal expert review based on criteria of relevance, transferability, policy alignment, and institutional uptake

**Inclusion and Assessment Criteria:**

To ensure relevance to IAM4RE's objectives, practices were only included if they met the following:

- **Publicly documented and accessible**: materials or descriptions available online or via project deliverables
- **Alignment with WP1-identified needs**, particularly in capacity building for IP, IA, standardisation, or impact generation
- **Focus on HEIs, PROs, RSOs, and other research/innovation actors**, including researchers, TTO staff, and institutional managers
- **Clarity in structure and target audience**, allowing potential adaptation or integration into IAM4RE training tools
- **Evidence of implementation, feedback, or impact**, even if qualitative, where available

The practices were recorded and assessed in a standardised data matrix (see 4.2), covering key dimensions such as:

1. Target Group
2. Institutional Type
3. Learning Domain
4. Training Format
5. Main Topic(s)
6. Evidence of Impact
7. EU-funding status
8. Internal Notes and Recommendations for IAM4RE relevance

This catalogue forms the empirical foundation for further synthesis, gap identification, and recommendations for future training tool design (see Section 6).

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

### *2.2.4. Phase 3: Classification and Synthesis*

To ensure a meaningful synthesis, collected practices were categorised using a multidimensional classification matrix comprising eight core dimensions. This structure enabled the team to assess the diversity, relevance, and transferability of the training offers and to extract patterns, gaps, and opportunities for future content development.

Each practice was assessed along the following dimensions:

1. **Target Group(s):** The primary audience addressed by the training format (e.g. PhD researchers, postdocs, academic staff, technology transfer officers, institutional managers, policy actors). This helped map who is currently being served and where gaps in coverage remain.
2. **Institutional Type:** The type of organisation delivering or hosting the training (e.g. Higher Education Institutions (HEIs), Public Research Organisations (PROs), Research and Technology Organisations (RTOs), standardisation bodies, EU-funded networks). This dimension reflects delivery capacity and institutional anchoring.
3. **Learning Domain:** The core thematic area of the training (e.g. knowledge valorisation strategies, intellectual asset management, standardisation integration, open innovation, entrepreneurship, impact planning). This provides insight into content focus and thematic depth.
4. **Training Format / Type of Material:** The pedagogical approach and delivery medium (e.g. online modules, blended learning programmes, interactive toolkits, case studies, games, workshops, mentoring schemes). This allows comparison of formats and potential for replication or adaptation.
5. **Main Topic(s):** Specific focus areas tackled within each training offer, such as licensing, Open Science alignment, societal impact, TRL assessment, or stakeholder collaboration. This helped to cluster practices by content depth and policy relevance.
6. **Evidence of Impact:** Qualitative or quantitative indicators of reach, uptake, or effectiveness (e.g. number of participants, user feedback, observed behavioural changes, replication by other institutions). This dimension supported the assessment of maturity and effectiveness.
7. **EU-Funding Status:** Whether the training was supported by EU funding (e.g. Horizon Europe, COST, Erasmus+), co-funded nationally, or developed independently. This helped assess sustainability, scalability, and alignment with EU policy frameworks.
8. **Internal Notes and Recommendations for IAM4RE Relevance:** Expert observations on transferability, integration potential, and adaptation needs in the IAM4RE context. These notes inform the prioritisation of practices for further use.

By applying this structured classification, IAM4RE was able to identify both promising practices and persistent gaps. The synthesis revealed areas of convergence—such as growing interest in societal impact, Open Science, and entrepreneurial readiness—as well as gaps in standardisation awareness, institutional integration, and availability of train-the-trainer models.

**Emerging Combinations and Cross-Cutting Patterns**
Beyond assessing individual dimensions, the classification matrix enabled the identification of

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

**emerging combinations of features** that reflect novel or high-potential approaches to training in Knowledge Valorisation and Standardisation. These include:

- **Cross-sectoral training formats** that bridge academic research with standardisation processes, such as serious games or toolkits integrating entrepreneurship and Open-Source licensing.
- **Practices targeting under-served groups**, such as SSH researchers or early-career academics, with tailored content on societal impact and personal valorisation strategies.
- **Blended formats** combining modular content, mentoring, and real-world engagement, enabling deeper institutional uptake and learner engagement.
- **Train-the-trainer schemes** embedded within broader capacity-building ecosystems, aimed at institutionalising roles such as impact managers and KV ambassadors.
- **Integrated policy-practice formats**, such as peer-learning exercises and workshops aligned with EU policy initiatives, supporting coherence between institutional practice and policy goals.

These patterns informed the thematic clustering in **Section 6** and serve as building blocks for IAM4RE's training scheme design, allowing the project to combine tested approaches with innovative, high-impact elements

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 3. Phase 0: Key Findings from WP1 Landscape Analysis

Task 1.1 – *Landscape analysis showing gaps and most relevant needs of the target groups to enable identification of the scope of the training and service resources to be developed* – provided a structured diagnostic of the current state of play in Knowledge Valorisation (KV) and Standardisation capacities across European research ecosystems.

Drawing on input from **65 stakeholders** collected through a targeted survey, the task aimed to:

- **Assess the implementation status** of the Guiding Principles and associated Codes of Practice across different institutional settings;
- **Identify capacity and skills gaps** among IAM4RE's target groups, including researchers, research managers, and innovation support staff; and
- **Provide input directly** into the development of stakeholder guidelines under Task 1.2 and the design of innovative service formats across WP2–WP4.

The analysis highlighted three persistent challenges:

### 3.1 Persistent Skills Gaps

Survey results revealed widespread gaps in skills and awareness related to IP, knowledge valorisation, and standardisation:

- Many researchers — particularly in early career stages and non-STEM fields — reported low familiarity with IP and intangible assets.
- Standardisation was commonly perceived as highly technical or only relevant at later stages of the research process.
- A significant share of respondents had not received any formal training on IP strategy, licensing, or the strategic use of standards.
- Several participants expressed uncertainty around how research outputs translate into actual innovation or societal impact.

"Many researchers don't realise that IP and standards are part of the impact pathway, not just administrative boxes to tick." – *Survey respondent*

### 3.2 Institutional Barriers and Fragmentation

The survey also exposed a fragmented institutional landscape, with uneven support structures and coordination:

- Limited collaboration between IP, technology transfer, and research support units.
- Few formal incentives or mandates for staff and researchers to engage in KV or standardisation training.
- Over-reliance on individual initiative, especially in less research-intensive institutions.
- Repeated calls for better integration of IP, Open Science, and standardisation within institutional strategies.

"There is no strategy, neither incentive. Just a few research labs have any formal quality or standard accreditation."

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

"The bottleneck is often not knowledge, but time and recognition." – *Survey respondents*

### 3.3 Disconnection between IP and Standardisation Pathways

A final, recurring theme was the disjointed treatment of IP and standardisation in training and institutional support:

- Most respondents reported exposure to either IP or standardisation, but rarely both in an integrated format.
- Standardisation was frequently seen as optional or peripheral to the innovation process.
- Many institutions lacked dedicated staff or processes to support the strategic use of standards in research valorisation.

"Standardisation and IP are seen as separate worlds. But for real valorisation, they have to converge." – *Survey respondent*

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 4. Phase 2: Data Collection

## *4.1. Used sources for Best Practice Collection*

The collection of best practices under IAM4RE was grounded in an extensive and diverse set of sources, carefully selected for their relevance to Knowledge Valorisation (KV) and Standardisation in the context of research and innovation. These sources span EU-funded initiatives, institutional repositories, standardisation platforms, and networks of research and innovation actors. The compilation aimed to ensure geographic and institutional diversity while capturing different maturity levels and training models.

**The primary sources consulted included:**

- **European Commission-funded initiatives and platforms:**
  - **HSBooster.eu** – Training and mentoring on standardisation in EU-funded R&I projects
  - **European IP Helpdesk** – EU-funded initiative providing capacity building, training, and awareness-raising on intellectual property and innovation management, with a focus on the needs of researchers, SMEs, and EU-funded projects.
  - **StandICT.eu** – Training and support for European ICT standardisation experts
  - **EDU4Standards** – Educational resources linking research, standards, and teaching
  - **Horizon Europe NCP Portal** – TRL assessment and research valorisation guidance
  - **REVALORISE+** – Valorisation training for SSH researchers and research support staff
  - **Zoom4EU Toolkit** – Open-source tools for entrepreneurship and licensing readiness
  - **CEETNOVA** – Entrepreneurial capacity-building in Ibero-American and EU universities
  - **MLE Knowledge Valorisation & Policy Support Facility (PSF)** – Peer-reviewed models, country case studies, and training examples
  - **COST Academy** – Training and networking for research managers and policy intermediaries
  - **IMPAC3T-IP** – Training and mentoring on IP management, sustainability, and market-oriented valorisation for R&I projects
  - **Impact Licensing Initiative (ILI)** – Knowledge resources on strategic licensing for societal impact and open innovation
- **Public Research Organisations (PROs) and Higher Education Institutions (HEIs):**
  - **TU-Delft –** Examples of cross-functional training combining IP, entrepreneurship, and valorisation
  - **NOVA University Lisboa** – IP training and open access valorisation practices
  - **KTH Innovation Readiness Level** – Structured tool for evaluating innovation and team maturity
  - **Tilburg University / THRIVE Institut** – Impact school and open science training for SSH researchers

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

  - **DIN Academy** – Modular courses and certificate programmes on standards in innovation
  - **University of Bologna, Trento, and CODAU members** – Valorisation-related training and policy capacity building
- **Standardisation bodies and associations:**
  - **DIN** – National standardisation training and integration of R&I actors
  - **CEN-CENELEC** – Liaison training and policy outreach activities for standardisation
  - **ISO** – International technical standard development and education outreach
  - **ETSI** – ICT standardisation and innovation training
  - **ANEC** – Capacity building in inclusive standardisation and civil society engagement
  - **ECOS** – Sustainability and environmental standards training for research
  - **EFIS Centre** – Foresight-based tools linking standardisation, R&I, and future policy
  - **SEEBLOCKS Academy** – European Blockchain training initiative including standardisation modules
- **Network and policy actors:**
  - **ASTP** – Professional development and policy training for technology transfer and valorisation
  - **IGLO Network** – Capacity building and advocacy in EU R&I framework programmes
  - **EU NCP Networks** – IP and TRL assessment resources for national contact points

These sources were selected based on their known involvement in training, capacity building, and institutional change processes in the areas of IP management, valorisation, standardisation, and impact-driven research.

## *4.2. Overview of Practice Collected*

A total of 30 best practices were selected for inclusion based on predefined assessment criteria focusing on relevance, scalability, impact, and alignment with the IAM4RE objectives. The dataset features a diverse mix of training offers, online toolkits, workshop formats, mentoring schemes, and strategic capacity-building resources, designed to support various stages of knowledge valorisation and standardisation.

**Distribution overview:**

- **By main topic:** The training practices were thematically clustered around four focal areas: **Knowledge Valorisation**, **Standardisation**, **Intellectual Asset Management**, and **Mixed/Other**. The majority of practices focus on Knowledge Valorisation, including researcher engagement, impact generation, and entrepreneurship. **Standardisation** appears as a substantial category in the mapped dataset (13 out of 30 practices); however, this reflects **purposeful oversampling** to allow for meaningful analysis. In practice, standardisation-related training remains **scarce** across the broader ecosystem: the desk research reached a saturation point after identifying 13 examples, whereas Knowledge Valorisation formats remained far

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

more abundant. With few exceptions—most notably **HSBooster.eu**—standardisation-focused offers rarely establish strong links to research contexts or policy integration. **Intellectual Asset Management** features prominently in structured IP training and exploitation strategies. A fourth cluster covers **hybrid or integrative approaches**—such as Open Science, TRL assessment, and collaborative ecosystems—that blend multiple dimensions of valorisation and are particularly relevant for institutional capacity building.

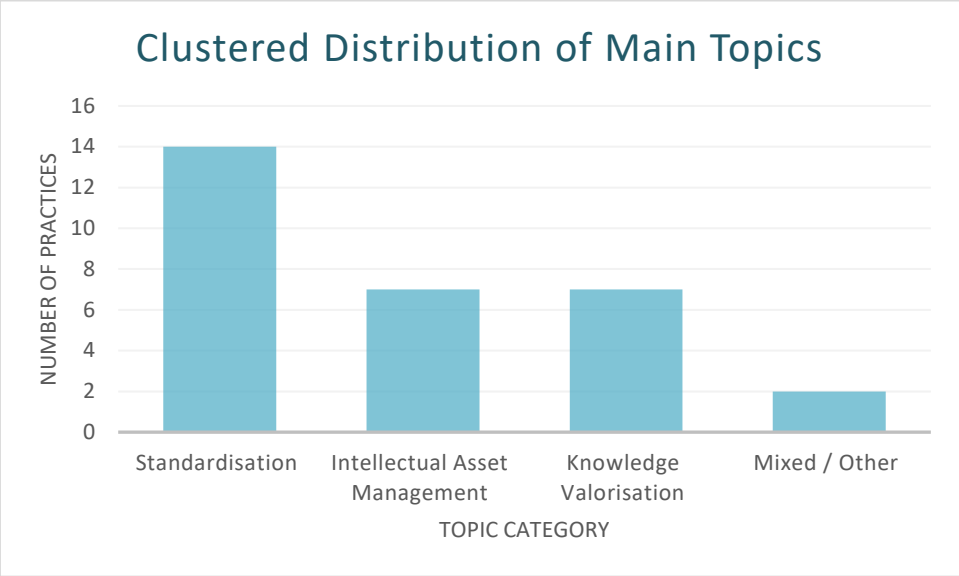


Chart 2 – Clustered Distribution of Main Topics

- **By training format:** The practices range from structured blended learning programmes and certified courses to modular toolkits, self-paced online materials, game-based formats, and community-driven mentoring initiatives. This diversity addresses different learner preferences, stakeholder roles, and institutional implementation contexts.

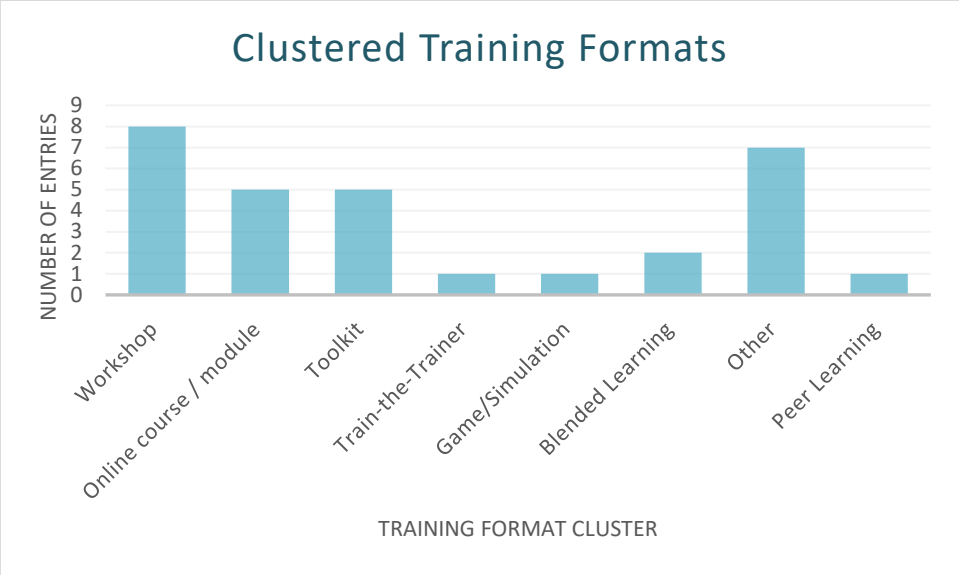


Chart 3 – Clustered Training Formats

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

In the clustered chart, the category **"Other"** includes training formats that did not clearly fit into the main clusters (Workshop, Online, Toolkit, Game, Blended, Course). Specifically, it covers:

- **Peer-learning / Mutual learning exercises** (e.g. PSF MLE on Knowledge Valorisation)
- **Network facilitation workshops**
- **Policy–practice seminars**
- **Simulation games or interactive learning not labelled as formal 'training'** (if already covered elsewhere)
- **Academic teaching materials without a defined format (e.g. slides/textbooks only)**
- **eLearning portals providing micro-learning or modular resources without structured sessions** (unless they were clearly online modules)

- **By institutional type:** The dataset includes contributions from Higher Education Institutions (HEIs), Research and Technology Organisations (RTOs), standardisation bodies, innovation intermediaries, and EU-wide platforms and consortia, showcasing the cross-sectoral nature of effective training initiatives.

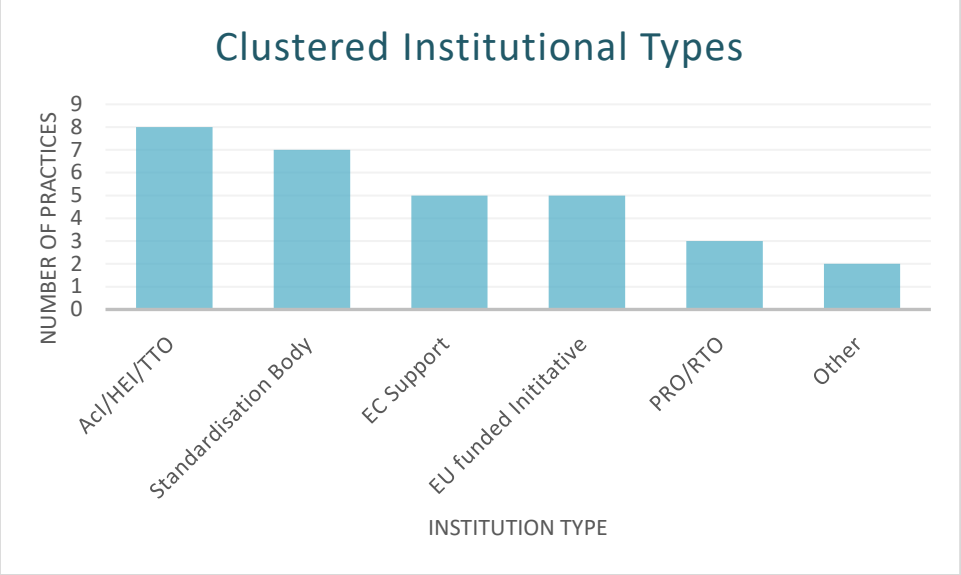


Chart 4 – Clustered Institutional Types

- **By geographical origin:** The practices span a wide range of European regions, with a strong presence from Western, Northern, and Southern Europe, complemented by a smaller but growing set of examples from Widening countries. This reflects persistent disparities in the capacity-building landscape and highlights opportunities for targeted support and replication. The collection deliberately prioritised EU-wide and pan-European training offers, in line with IAM4RE's mission to promote scalable, transferable resources that support systemic uptake across Member States.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

Task 2.1 - IAM4RE Best Practice Collection

| Entry ID | KV or Standardisation | Title of Practice | Organisation / Provider | Country | Contact Person (if known) | Target Group | Institutional Type | Training Format | Main Topic(s) | Short Description | Link / Reference | Evidence of Impact | EU-funded? (Yes/No) | Internal Assessment (optional) | Notes / Comments |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| BP001 | KV | IP & Commercialisation Bootcamp | TU Delft – Knowledge Transfer Office | Netherlands | Dr. Laura Jansen | PhD researchers, Postdocs | HEI / TTO | Workshop Series (in person + online) | Knowledge Valorisation, IP Strategy, Licensing | researchers with practical skills to identify, protect, and commercialise research results. Includes guest lectures, case studies, and pitch coaching. | https://www.tudelft.nl/en/valorisation/training/ip-commercialisation-bootcamp | Over 150 participants since 2022, positive feedback from tech transfer officers, increased invention disclosures. | No | High relevance, scalable, clearly structured, strong university support. | Could be adapted for other HEIs; consider including in training toolkit. |
| BP002 | Standardisation | Embedding Standards in Research & Innovation | DIN Academy (Germany) | Germany | Dr. Markus Heinzel | Researchers, TTO staff, innovation managers | Standardisation body / training provider | Online module + live Q&A session | Standardisation, Innovation Management, Knowledge Valorisation | professionals to the relevance of standards in R&I projects. Covers how to engage with SDOs, integrate standards in proposals, and leverage them for impact. | https://www.din-akademie.de/en/standardisation-in-research-and-innovation | Used by over 10 German universities; positive feedback on relevance for Horizon Europe proposal development. | No | Strong standardisation focus; clear practical guidance; scalable model for other Member States. | Could serve as a complementary module in IAM4RE training packages. |
| BP003 | KV | IP Training Curriculum | European IP Helpdesk | EU | Michele Dubbini / Claire Fritz | Beneficiaries and potential beneficiaries of EU funded projects | EC IP and Innovation Support | Workshop Series (in person + online) + live Q&A session | IP Management in different contexts | comprehensive regular training curriculum covers a wide range of topics and levels. | https://intellectual-property-helpdesk.ec.europa.eu/regional-helpdesks/european-ip-helpdesk/europe-training_en | more than 30.000 people trained | Yes | High relevance, scalable, clearly structured | Could be adapted for other HEIs; consider including in training toolkit. |
| BP004 | Standardisation | HSbooster.eu Training Academy & Deep Dive Services | HSbooster.eu | EU | Dr. Ivana Mijatovic | EU funded research projects (mostly H2020 and HE) | EC standardisation support | Written training materials, training session and webinars | Standardisation | based on 24 written chapters for autonomous learning; 10 training sessions on general standardisation provided by standardisation professionals and deep dive webinars which cover standardisation in a specific domain. | https://hsbooster.eu/ | More than 3000 people were connected to this trainigs material. | Yes | High relevance, clearly structured | It could be developed further to serve as a complementary module in IAM4RE training packages. |
| BP005 | Standardisation | EDU4Standards.eu Teachers | EDU4standards.eu | EU | Dr. Ivana Mijatovic | Teachers & trainers of standardisation | HEI / TTO | Instructions for teachers of standardisation related to content and experiences | Standardisation | Carefully systematised lists of books, research papers, games, practices, and experiences intended to help teachers in HEI to teach about standardisation. | https://www.edu4standards.eu/teacher-support-tool | The tool is still in a development phase | Yes | High relevance, clearly structured | It could be developed further to serve as a train-the-trainer program |
| BP006 | Standardisation | The Serious Smiley Game | HSbooster.eu | EU | Dr.Ivana Mijatovic | students, professors, TTOs, RSO | HEI / TTO / RSOs | Game | Role of researchers in standardisation, Innovation in standardisation | intended to increase understanding of standardisation process and raise awareness of issues related to the position of researchers in standardisation. It is intended for developing standardisation skills - reaching common agreement, strategic positioning and argumentation. | https://hsbooster.eu/serious-smiley-game | This is an onsite game, with highly positive feedback | Yes | High relevance | It could be adjusted to KV&Standardisation. Something like the Serious Smiley Game Part 2 |
| BP007 | KV | REVALORISE+ Researcher Training Programme | REVALORISE+ Consortium (VUA, UAB, NOVA, Université Gustave Eiffel, etc.) | EU | Dr. John Edwards | PhD researchers, postdocs (SSH focus | HEI/TTO | Blended (online workshops + lo | Knowledge Valorisation, Societal Impact | A 3-month blended programme helping SSH researchers identify valorisation opportunities and develop personal impact strategies with mentoring support and real-world engagement. | https://revalorise.eu/mission/training | Piloted in Italy with positive uptake among institutional TTO networks. | Yes | | |

Table 2 – Best Practice Collection Excerpt

This excerpt illustrates the multidimensional classification used to structure the collected training practices across eight core dimensions. The full catalogue, comprising 30 entries, is provided in Annex A.

The collection aims to offer a balanced portfolio, featuring both **mature practices** with demonstrated impact and **innovative, early-stage initiatives** that experiment with new pedagogical models, digital formats, or institutional embedding mechanisms. Together, they provide a rich foundation for the co-design of IAM4RE training schemes and policy recommendations.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

## 4.3. *Interview Insights*

To complement the desk-based mapping of best practices, the IAM4RE team conducted eight semi-structured expert interviews between late June and mid-July 2025. These interviews added qualitative depth to the empirical findings and offered timely perspectives on the current state of capacity building in Knowledge Valorisation (KV) and Standardisation across Europe.

**Interviewee Profile and Overview**

Interview partners were selected based on an expert profile developed under Task 2.1. This profile targeted professionals with a minimum of two years of experience in intellectual asset management, innovation support, or standardisation, and direct involvement in designing or delivering training formats. Suitable institutional affiliations included public research organisations (PROs), higher education institutions (HEIs), technology transfer offices (TTOs), innovation intermediaries, and standardisation interface bodies.

The final interview group reflected a broad diversity of institutional backgrounds and national contexts. It included innovation managers, standardisation officers, IP trainers, TTO directors, and Open Science advisors. All interviewees had direct experience with training activities—either as developers, facilitators, or informed participants—and many had participated in international initiatives or national reform processes relevant to IAM4RE.

**Interview Participants and Key Attributes**

The following experts contributed to the interviews and most of them agreed to be named in this deliverable:

| Entry ID | Name | Affiliation | Country | Role / Area of Expertise | Preferred Training Format |
|---|---|---|---|---|---|
| IC001 | Christophe Haunold | University of Luxembourg | France / Luxembourg | TTO director, valorisation and institutional policy | Internal train-the-trainer, peer learning, mentoring |
| IC002 | Valentina Romano | Politecnico di Torino | Italy | Knowledge transfer and training coordinator | Career-stage-targeted workshops, train-the-trainer, impact strategy coaching |
| IC003 | Anonymous | N/A | Italy | Research impact officer, Open Science and entrepreneurship | Coaching, embedded formats, modular IP-OS awareness, co-design |
| IC004 | Claire Dalier | CEN & CENELEC (SEN & Senelec) | Belgium / France | Standardisation advisor, policy and implementation | Sector-specific webinars, Academic Standard Days, Technical Body Seminars, MOOCs |
| IC005 | Magnus Hakwag | House of Knowledge | Norway | Entrepreneurship and innovation educator | Bootcamp formats, business modelling, entrepreneurial mindset training |
| IC006 | Eugene Sweeney | Iambic Innovation | UK | Innovation expert, IP strategy, research exploitation | Coaching, project-grounded reflection, storytelling, soft skills |
| IC007 | Michele Dubbini | EU IP Helpdesk / Horizon | Germany / Italy | IP expert, IAM trainer, exploitation planning | Modular real-case sessions, mentoring, blended formats, legal/IP toolkits |

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

| | | | | | |
|---|---|---|---|---|---|
| | | Results Booster | | | |
| IC008 | Michal Beluský | Czech Academy of Sciences | Czech Republic | Research support, valorisation, national reform processes | Peer exchange, co-creation workshops, examples-based training |

Table 3 – Interview Participants and Key Attributes

These interviews helped triangulate the findings from desk research, validated the classification of good practices, and informed the design logic for IAM4RE's modular training scheme.

**Key Themes and Insights**

The interviews explored five key dimensions: institutional role, training activities and tools, effectiveness and impact, perceived gaps and needs, and practical recommendations for IAM4RE. Thematic patterns emerged across institutional types and regional contexts.

**Training Types and Preferred Formats**

Interviewees reported a wide variety of training formats, ranging from project-specific coaching to system-level initiatives. Commonly cited formats included:

- **Modular, blended training sessions** tailored to research stage, professional role, or project needs;
- **Embedded mentoring and coaching**, often within EU-funded projects (e.g. Horizon Europe, HRB);
- **Train-the-trainer schemes** in institutional or network settings;
- **Sector-specific webinars** and thematic academic events;
- **Peer-learning workshops** designed around lived institutional experiences;
- **Entrepreneurial bootcamps** combining standardisation, IP, and business development topics.

External resources such as the European IP Helpdesk, CEN-CENELEC platforms, HSBooster.eu, and Espacenet were frequently referenced. Several interviewees expressed the need for "trainer-ready" versions of these materials, adapted for local reuse and tailored delivery.

**Success Factors and Challenges**

Effective training was consistently linked to four elements:

- **Contextualisation**: Customising content to institutional settings or project realities;
- **Interactivity**: Using role plays, practical exercises, and dialogue-based formats;
- **Cross-sectoral input**: Involving legal, policy, and entrepreneurial actors;
- **Continuity**: Offering structured pathways rather than isolated events.

Common barriers included:

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

- **Time and incentive gaps**: Support staff and researchers often lack time, recognition, or institutional reward for engaging in training;
- **Limited awareness of standardisation**: Often perceived as technical or marginal;
- **Fragmentation and lack of reuse**: Existing EU-funded resources are underused due to complexity or lack of localisation support;
- **Post-project fragility**: Many training formats dissolve after funding ends, limiting long-term institutional learning.

**Gaps and Capacity-Building Needs**

Across interviews, several structural and operational gaps were highlighted:

- **Lack of early-stage integration** of IA management and standardisation in R&I planning;
- **Underdeveloped train-the-trainer infrastructure**, particularly in PROs and HEIs;
- **Need for adaptable, modular resources** with clear guidance for context-based reuse;
- **Insufficient training on non-patent assets**, including software, data, and networks;
- **Demand for peer-learning platforms** that promote institutional exchange;
- **Need for more dedicated funding** and policy alignment to sustain training efforts long-term.

Multiple participants called for EU-level action in providing standardised agreement templates, matchmaking platforms, micro-credentials, and guidance aligned with the new ERA policy agenda and valorisation framework.

**Relevance for IAM4RE**

All interviewees expressed strong interest in contributing to IAM4RE. Several provided training materials, slide sets, or methodological references, and many signalled willingness to participate in follow-up activities, including stakeholder panels, pilot testing, or advisory workshops. Their insights were instrumental in shaping the classification matrix, the design logic for modular training resources, and the policy-practice alignment foreseen in WP2 and WP3.

**Stakeholder Perspectives (anonymised quotes from interviewees)**

“People don’t want theory—they want to know how it applies to their project, right now.”
— TTO professional, technical university

“Standardisation only works if researchers see it as part of their impact story. Otherwise, it’s just noise.”
— Liaison officer, standardisation body

The IAM4RE.eu has received funding from the European Union’s Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

“We need more trainer-ready modules. Most EU-funded tools are great—but too complex to re-use without help.”
— Innovation support advisor, regional HEI

“Bootcamps work well when they’re hands-on. It’s about mindset, not slides.”
— Academic entrepreneurship trainer, applied science institution

“Soft assets are where most researchers are today. Nobody’s teaching them how to valorise visibility, software, or data.”
— Open Science liaison, EU initiative

“Too much depends on personal networks. If one expert leaves, the system collapses. IAM4RE should help build more resilient training structures.”
— Senior innovation manager, university consortium

These insights strongly confirm the urgency of IAM4RE’s mission: to provide sustainable, flexible, and context-sensitive training solutions that support institutional change, policy uptake, and meaningful engagement with both standardisation and intellectual asset management across Europe’s research and innovation ecosystems.

The IAM4RE.eu has received funding from the European Union’s Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 5. Phase 3: Synthesis and Classification

## *5.1. Classification Matrix*

To enable a structured synthesis of the identified best practices and training materials, all collected entries were analysed and categorised using a multidimensional classification matrix. This matrix forms the analytical backbone of the synthesis phase and supports a comparative view across training formats, institutional contexts, and strategic alignment dimensions.
The classification matrix is designed to make visible both the diversity and the concentration of efforts in existing training offers. It also supports the identification of patterns, complementarities, and gaps, thereby directly informing the design logic for future IAM4RE training tools.

Each best practice was reviewed and tagged according to the following core dimensions:

**Target Group**
This dimension captures the primary audience the training activity or resource is intended to serve. Understanding the target group is essential for assessing the relevance and inclusiveness of existing training offers.

Typical categories include:

- **PhD candidates** – doctoral researchers in need of foundational training on IP, valorisation, and standardisation
- **Postdoctoral researchers and early-career academics** – individuals transitioning into independent research roles, often facing new demands in project development, innovation, and impact
- **Principal Investigators (PIs) / Academic staff** – mid- to senior-level researchers involved in project leadership, intellectual asset development, or third-party engagement
- **Research support officers** – staff supporting grant preparation, project implementation, or research impact strategies, often in coordination with TTOs or policy units
- **Technology Transfer Officers (TTOs)** – staff responsible for managing IP, negotiating licenses, and supporting research commercialisation
- **Institutional managers / Innovation officers** – strategic personnel involved in institutional policy, research assessment, or knowledge valorisation
- **Standardisation experts / Liaison officers** – individuals acting as intermediaries between research institutions and standardisation bodies
- **National Contact Points (NCPs) for Valorisation and Standardisation** – national-level advisors supporting access to EU programmes, policy implementation, and training dissemination in line with Horizon Europe priorities

**Institutional Type**
This dimension refers to the kind of organisation that develops, delivers, or hosts the training activity. It provides insights into the structural context and potential for transfer or scaling of the practice.

Categories include:

- **Higher Education Institutions (HEIs)** – universities and polytechnics delivering training to internal researchers or external stakeholders

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

- **Public Research Organisations (PROs)** – national research bodies with dedicated valorisation support structures
- **Research and Technology Organisations (RTOs)** – applied research institutes often serving as intermediaries between science and industry
- **Standardisation bodies** – formal standard-setting organisations or affiliated training branches (e.g. CEN, DIN, ISO, ETSI)
- **EU-funded platforms and projects** – consortia or coordination initiatives (e.g. HSBooster.eu, REVALORISE+) developing transferable models
- **Innovation support organisations** – intermediaries such as EEN nodes, competence centres, or valorisation offices

**Learning Domain**

This dimension captures the thematic focus and intended learning outcomes of the training. It reflects the specific skills, knowledge areas, or conceptual frameworks addressed in each offer.

Domains identified include:

- **Knowledge Valorisation Strategy** – strategic planning and implementation of valorisation pathways, stakeholder engagement, and route-to-impact thinking
- **Intellectual Property (IP) and Intellectual Asset (IA) Management** – protection, exploitation, and strategic management of tangible and intangible assets
- **Standardisation in Research and Innovation** – awareness and operational integration of standards as tools for impact and valorisation
- **Entrepreneurship and Innovation Readiness** – business model development, investment readiness, and start-up/spin-off support
- **Open Science and Responsible Research** – alignment with open access, FAIR data, and broader research reform processes
- **Impact Planning and Assessment** – designing, capturing, and demonstrating scientific, societal, or economic impact

**Training Format / Type of Material**

This final dimension captures the pedagogical approach and delivery method. It informs tool development under WP2.

Common formats include:

- **Workshops and Seminars** – in-person or online, synchronous and cohort-based
- **Online Courses / MOOCs** – asynchronous, self-paced, scalable modules
- **Toolkits and Guidelines** – structured, often modular resources for independent use
- **Blended Learning Programs** – combining online/offline elements, mentoring, and applied projects
- **Mentoring and Coaching Schemes** – sustained, personalised or small-group learning formats
- **Serious Games and Interactive Formats** – gamified or experiential learning approaches
- **Train-the-Trainer Models** – empowering multipliers and institutional facilitators

The full application of these dimensions is presented in the classification matrix / Best Practice Collection (Annex A). This structured categorisation provides the basis for clustering practices thematically (see Section 5.2), identifying underrepresented segments, and formulating strategic recommendations (see Section 6).

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

## 5.2. Thematic Clusters Identified

Based on the multi-dimensional classification and synthesis of the 30 collected training practices, five thematic clusters emerged. These clusters reflect commonalities in learning objectives, institutional engagement models, and strategic orientation. They help identify where efforts are concentrated—and where additional investment or innovation may be needed.

Each cluster represents a functional area in which specific types of knowledge, tools, and target groups converge. These clusters serve as analytical lenses to map strengths, gaps, and transferable models within the current training landscape.

**1. Entrepreneurship and Intellectual Asset Management**

This cluster encompasses training formats that focus on entrepreneurial skills, business modelling, investment readiness, and the strategic use of IP and other intangible assets. These programmes often target researchers transitioning into spin-offs or those engaged in applied R&I projects.

Key features:

- Integration of IA management with early-stage venture development
- Emphasis on strategic exploitation and commercialisation pathways
- Inclusion of funding-readiness and investor communication modules
- Strong ties to entrepreneurship centres, incubators, or EIC-related schemes

Examples:

- Zoom4EU Toolkit (Entrepreneurial IP and open-source exploitation)
- KTH Innovation Readiness Level (Scalable model for assessing and accelerating innovation)

**2. Standardisation Awareness and Integration**

Despite low overall visibility, this cluster contains training offers that explicitly promote standardisation as a valorisation pathway. Activities in this cluster aim to raise awareness, build interface capacity, and embed standardisation considerations into research design and impact planning.

Key features:

- Foundational understanding of the role of standards in R&I
- Applied modules on engaging with standardisation bodies or using standards for dissemination and uptake
- Targeted resources for TTOs, interface staff, research support offices and standardisation liaison officers

Examples:

- HSBooster Training Academy (Bespoke support and online modules for researchers)
- DIN Academy Webinars (Introductory and advanced training on standardisation in innovation)

**3. Interdisciplinary and Societal Valorisation**

This cluster includes practices designed for researchers in the Social Sciences and Humanities (SSH) or those working in interdisciplinary settings. Training here often focuses on non-

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

commercial valorisation, societal impact, stakeholder engagement, and alternative IA types such as data, software, and networks.

Key features:

- Emphasis on broader impact narratives and public value
- Capacity building for softer assets (e.g. visibility, credibility, uptake)
- Peer learning and mentoring formats supporting reflection and empowerment

Examples:

- REVALORISE+ (Valorisation for SSH researchers, with role-based training and mentoring)
- Tilburg University / THRIVE Institute (Value creation beyond IP for early-stage researchers)

**4. Policy-Linked Practice and Institutional Capacity Building**

Training formats in this cluster are strongly aligned with European policy frameworks and reform agendas. They address institutional transformation, strategic embedding of valorisation in HEI governance, and the training of innovation professionals or impact managers.

Key features:

- Coherence with ERA policy priorities, Open Science reform, and reward system evolution
- Focus on systemic change and institutional workflows (e.g. impact units, KV offices)
- Often implemented via EU-funded CSA projects or MLE spin-offs

Examples:

- MLE Knowledge Valorisation & Policy Support Facility (PSF)
- CEETNOVA (Policy-oriented support for cross-border collaboration and impact infrastructure)

**5. Researcher-Focused Capacity Building Tools**

This broad cluster gathers training offers targeting individual researchers at various stages—mainly through practical toolkits, modular resources, or short workshops. It reflects the most widespread category but often lacks depth or institutional embedding.

Key features:

- Generic, modular materials that can be deployed across institutions
- Typically, short-form, with limited follow-up or certification
- High potential for reuse and adaptation, but sometimes low uptake

Examples:

- EU IP Helpdesk Webinars & Factsheets (Reusable formats with EU-wide reach)
- HSBooster Training Academy (Bespoke support and online modules for researchers)

These thematic clusters form the basis for the gap and opportunity analysis in Section 6. They allow IAM4RE to target under-served domains (e.g. standardisation in SSH, institutional train-the-trainer models) and build modular, cross-cluster learning journeys in WP2.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

## *5.3. Good Practice Examples*

To illustrate the diversity, quality, and strategic value of the identified best practices, this section presents three curated examples—each representing a distinct thematic cluster. These cases were selected for their strong alignment with IAM4RE objectives, clear documentation of outcomes, and demonstrated potential for adaptation in different institutional contexts. They also showcase a range of pedagogical approaches, from blended learning and mentoring to self-assessment and toolkits.

**Case 1: HSBooster.eu Training Academy**

**Cluster**: Standardisation Awareness and Integration

**Provider**: HSBooster.eu Consortium (EU-funded)

**Target Group**: Researchers involved in EU funded projects

**Format**: Online training modules, mentoring, and helpdesk support

**Description:**

HSBooster Academy provides capacity-building support to EU-funded research and innovation projects that seek to integrate standardisation strategies into their work. It combines asynchronous training modules with a helpdesk and one-to-one mentoring by standards experts. The content ranges from foundational knowledge of the standardisation process to strategic use of standards for dissemination, exploitation, and impact enhancement.

**Impact & Transferability:**

- Successfully embedded in Horizon Europe workflows
- Used across diverse technology domains (e.g. AI, health, materials)
- High adaptability to various sectors and project types
- Reinforces the policy goal of increasing standards uptake in R&I

**Relevance for IAM4RE:**

HSBooster offers a transferable model for role-specific standardisation training that can be adapted to support TTOs, academic liaison officers, or research project managers. It demonstrates effective alignment between policy priorities and capacity-building mechanisms.

**Case 2: REVALORISE+ Training Academy**

**Cluster:** Societal and Interdisciplinary Valorisation
**Provider:** REVALORISE+ Consortium (Erasmus+ project)
**Target Group:** Researchers in the Social Sciences and Humanities (SSH), research support professionals
**Format:** Blended learning, peer mentoring, role-based learning pathways

**Description:**
REVALORISE+ provides structured support for SSH researchers seeking to increase the societal value and visibility of their research. It addresses both personal and institutional capacities, focusing on skills such as stakeholder mapping, impact planning, and engagement beyond academia. Its blended learning approach combines interactive online content with reflection, peer exchange, and practical tools.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

| |
|---|
| **Impact & Transferability:**<br>• Evidence of behavioural and mindset change among participants<br>• Recognised by universities and research networks as a discipline-sensitive model<br>• Available in open-access format for wider uptake<br>• Applicable beyond SSH contexts for fostering inclusive valorisation<br>**Relevance for IAM4RE:**<br>The REVALORISE+ model exemplifies inclusive, identity-aware capacity building with strong attention to often under-served disciplines. It offers formats that can be modularised or translated into IAM4RE's own blended or train-the-trainer approaches. |
| **Case 3: KTH Innovation Readiness Level (IRL) Framework**<br>**Cluster:** Entrepreneurship and Intellectual Asset Management<br>**Provider:** KTH Royal Institute of Technology, Sweden<br>**Target Group:** Researchers, academic entrepreneurs, TTO staff<br>**Format:** Self-assessment framework, coaching support, and diagnostic tool<br>**Description:**<br>The Innovation Readiness Level (IRL) framework is a structured tool for assessing the maturity of research-based innovations across multiple dimensions—including team composition, IP status, customer insights, and funding readiness. It provides a common language for innovation development and serves as the basis for tailored coaching and strategic interventions.<br>**Impact & Transferability:**<br>• Adopted widely across HEIs and innovation projects in Sweden and beyond<br>• Enables self-directed learning and structured innovation support<br>• Freely available under Creative Commons license<br>• Recognised as a good practice in impact-oriented entrepreneurship training<br>**Relevance for IAM4RE:**<br>The IRL tool offers a concrete, scalable framework that can underpin IAM4RE's support for academic entrepreneurs and TTOs. It supports modular training development and encourages self-reflection among research teams on valorisation pathways. |

Table 4 – Good Practice Examples

These three cases—spanning policy alignment, societal valorisation, and entrepreneurial capacity building—exemplify the breadth of training models available in Europe. Together, they provide valuable inspiration for IAM4RE's future training concepts and serve as reference points for customising content, delivery methods, and stakeholder engagement strategies across institutional contexts.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 6. Phase 4: Outputs - Gaps and Opportunities

The synthesis of training practices and thematic clustering conducted in Phase 3 provided a structured view of the current landscape of capacity building offers in Knowledge Valorisation (KV) and Standardisation. While promising practices exist, the analysis revealed critical **gaps, unmet needs, and structural challenges** across institutional types, training formats, and thematic domains. These findings form the strategic foundation for the development of the IAM4RE training scheme and are summarised below.

## *6.1. Gaps in the Current Training Landscape*

Several recurrent gaps and under-served areas emerged from the classification and clustering process:

1. **Limited integration of standardisation in research training:** Few existing offers actively embed standardisation as a valorisation tool. Training for researchers and TTOs on how to interface with standard-setting organisations is scarce, especially outside technical domains.
2. **Lack of modular, multi-level training architectures:** Most practices are either general introductory sessions or highly specialised workshops. There is a lack of comprehensive learning pathways that progress from basic to advanced levels or that combine theoretical input with applied mentoring.
3. **Insufficient support for non-patentable intellectual assets:** The valorisation of knowledge beyond patents (e.g. data, software, methods, open assets) remains marginal in most training offers, despite its relevance in SSH and interdisciplinary research.
4. **Scarcity of train-the-trainer (TtT) models:** There is a marked absence of programmes aimed at building internal training capacity within institutions, particularly in Widening countries or smaller PROs.
5. **Few services targeting institutional embedding and policy alignment:** Most offers are individual-learner-focused. Strategic valorisation planning at the institutional level, policy alignment, and research assessment reforms are rarely addressed.
6. **Fragmented provision and poor visibility:** While many high-quality materials exist, they are often isolated, poorly disseminated, or not connected to larger training suites or reusable formats.

## *6.2. Capacity Building Needs*

These gaps translate into specific capacity building needs for IAM4RE target groups:

- **For researchers (early to advanced career stages):**
    - Structured pathways that combine innovation readiness, IA management, and standardisation awareness
    - Discipline-sensitive content, especially for SSH and interdisciplinary research
    - Self-paced formats (e.g. MOOCs, toolkits) with embedded reflection and real-world case studies

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

- **For KTO / TTO and research support staff:**
  - Advanced modules on strategic IA management, legal/regulatory aspects, and open science integration
  - Train-the-trainer support, including didactic tools and assessment instruments
  - Certification frameworks to validate competence development
- **For institutional leadership and policy units:**
  - Strategic foresight and valorisation planning guides
  - Support in linking Open Science, impact pathways, and IP policies
  - Tools for embedding KV and standardisation in research culture and reward systems

## *6.3. Recommendations for Tool & Service Design*

To address the identified gaps, the following key design recommendations are proposed and will be implemented under IAM4RE's WP2:

| Need Identified | IAM4RE Response |
|---|---|
| Fragmentation of training offers and lack of multi-level content | **Task 2.2: Structured Training Suite of 12 progressive modules** (from basic to advanced), addressing the **full spectrum** of standardisation and knowledge valorisation — from IA management and entrepreneurship to innovation compliance and strategic handling of data and IP. |
| Absence of scalable and flexible learning formats | **Task 2.3: MOOC format** with **8 modules**, quizzes, assignments, and final project, focused on strategic planning, standardisation, and impact design |
| Low trainer capacity and multiplier effects in AcIs/HEIs/PROs | **Task 2.4:** A 6-module format **Train-the-Trainer Programme** with guidebook, assessment tool |
| Weak integration of policy and strategic guidance | **Task 2.5: New service formats** (e.g. roadmaps, templates, planning guides) to support institutional valorisation strategies and alignment with ERA |
| Underdeveloped support for non-patent IA and open approaches | Tailored materials on **non-patent asset valorisation**, **open innovation models**, and **spin-off readiness** |

Table 5 – Key Design Recommendations

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

**IAM4RE Training Content Map:**

| Selection of Best Practice – Needs Analysis (M1-4) | | | | |
|---|---|---|---|---|
| | **Training Suite** | **MOOC** | **Train-The-Trainer Programm** | **New / Improved Services** |
| **WHAT?**<br>**Thematic Blocks** | **Basic:**<br>Innovation and Knowledge Transfer Foundations (3 modules)<br>**Intermediate:**<br>Strategic Innovation and Compliance Pathways (5 modules)<br>**Advanced:**<br>Entrepreneurship and Sustainable Innovation Management (4 modules) | **Basic:**<br>Strategic Research Planning and Capacity (3 modules)<br>**Intermediate:**<br>Standardisation and IAM (3 modules)<br>**Advanced:**<br>Research Valorisation & Commercialisation (2 modules) | **Basic:**<br>Foundations of Intellectual Asset Management (1 module)<br>**Intermediate:**<br>Entrepreneurship and KV (3 modules)<br>**Advanced:**<br>Strategic Integration of Standards and Ethics (2 modules) | Potential New Services:<br>1. Strategic IA Management Planning<br>2. Non-Patentable Intellectual Assets Management and Valorisation<br>3. Standardization Roadmapping<br>4. Integrated Open Science and Open Innovation in IA Management<br>5. Spin-off Launchpad |
| **HOW?** | • 12 modules<br>  • 3 basic<br>  • 5 intermediate<br>  • 4 advanced<br>• 2 guides of use<br>• 2 case studies<br>• 2 assessment tools<br>• 2 checklists | • 8 modules<br>  • 3 basic<br>  • 3 intermediate<br>  • 2 advanced<br>• Quizzes<br>• Assignments<br>• Final project | • 6 modules<br>  • 1 basic<br>  • 3 intermediate<br>  • 2 advanced<br>• Guide of Use<br>• Assessment Tool<br>• Checklist<br>• 2 Case studies | • 5 service formats<br>  • 2 improved<br>  • 3 new<br>• Templates<br>• Guidelines<br>• Planning guides<br>• Case studies |
| **For Whom?** | • students, researchers<br>• spin-offs<br>• research officers<br>• KTO / TTO staff<br>• NSBs | • students<br>• researchers<br>• spin-offs | • KTO / TTO staff | • KTO / TTO staff |

Table 6 – IAM4RE Training Content Map

These components, as detailed in the IAM4RE content map, will ensure that WP2 training developments directly respond to ecosystem needs while contributing to systemic capacity building across Europe.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 7. Conclusion and Next Steps

## *7.1. Summary of Key Takeaways*

This deliverable synthesises the findings from Task 2.1, combining a structured needs analysis with a curated review of training best practices in Knowledge Valorisation and Standardisation. Drawing on triangulated data sources—including desk research, stakeholder feedback, and expert interviews—the analysis produced a comprehensive classification matrix and thematic clustering of 28 exemplary practices.

Key insights include:

- **Fragmentation and uneven distribution** of training efforts across institutions, disciplines, and EU Member States;
- **Underrepresentation of standardisation** in researcher-focused and institutional training, despite its strategic policy relevance;
- **Limited availability of progression pathways and train-the-trainer schemes**, which restrict institutional uptake and sustainability;
- **Emergence of policy-aligned formats**, but with gaps in practical implementation and cross-sectoral relevance;
- **Persistent gaps in interdisciplinary and societal valorisation**, particularly for SSH communities and non-IP assets.

These findings confirm the need for a more coherent, modular, and inclusive capacity-building offer—one that can be scaled, contextualised, and anchored within institutional ecosystems.

## *7.2. Forward Outlook: From Mapping to to Development and Implementation*

With the completion of Task 2.1, IAM4RE moves from groundwork to focused development. The mapping of needs and practices has laid the empirical and strategic foundation for the structured design of training tools and formats under WP2.

The next steps include:

- **Development of the IAM4RE Training Suite (Task 2.2):** Using the classification of practices and identified training gaps to inform the content logic, structure, and modular configuration of the 12-module suite;
- **Prototyping of the MOOC and new institutional service tools (Tasks 2.3 and 2.5):** Aligned with the timeline leading up to milestone M2.4 (Educational Content Matrix), these tools will address critical areas such as IA planning, spin-off readiness, and standardisation pathways;

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

- **Design of the Train-the-Trainer Programme (Task 2.4):** Focused on creating a replicable, locally anchored format that enables KTO/TTO staff to embed training within their institutions.

These development tasks will culminate in the **transition to WP3** beginning in **Month 13**, where the newly developed formats will be tested and implemented across selected institutional environments. WP3 will operationalise delivery through:

- Delivery of activities (Tasks 3.2–3.4),
- Targeted engagement with PROs, AcIs, HEIs, and NSBs,
- And structured feedback mechanisms for continuous improvement.

By anchoring training development in both **EU policy priorities** and **field-validated needs**, IAM4RE is well-positioned to deliver a training ecosystem that supports inclusive, modular, and impact-driven capacity building for knowledge valorisation and standardisation across Europe's R&I landscape.

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 8. Sources:

## *8.1. Official EU Documents and Strategies*


Coalition for Advancing Research Assessment (CoARA). (2022). *Agreement on Reforming Research Assessment*.
https://coara.eu/agreement/the-agreement-full-text/
European Commission. (2021). *European Research Area (ERA) Policy Agenda 2022–2024*.
https://commission.europa.eu/system/files/2021-11/ec_rtd_era-policy-agenda-2021.pdf
European Commission. (2021). *Horizon Europe Strategic Plan 2021–2024*.
https://www.eeas.europa.eu/sites/default/files/horizon_europe_strategic_plan_2021-2024.pdf
European Commission. (2022). *Council Recommendation on the Guiding Principles for Knowledge Valorisation*.
https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32023H0499&qid=1678171231088
European Commission. (2022). *Standardisation Strategy*.
https://ec.europa.eu/commission/presscorner/detail/en/ip_22_661
https://ec.europa.eu/docsroom/documents/48598
European Commission. (2023). *Code of Practice on Standardisation in the European Research Area*.
https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32023H0498&qid=1678171117168
European Commission. (2023). *Code of Practice on the Management and Valorisation of Intellectual Assets*.
https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32023H0499&qid=1678171231088
European Commission. (2023). *Mutual Learning Exercise on Knowledge Valorisation*.
https://projects.research-and-innovation.ec.europa.eu/en/statistics/policy-support-facility/psf-challenge/mutual-learning-exercise-knowledge-valorisation-focus-skills-intersectoral-cooperation-and-incentive
European Commission. (n.d.). *EU Best Practice Portal – What is a Best Practice?*
https://webgate.ec.europa.eu/dyna/bp-portal/
European Commission. (n.d.). *HEInnovate Framework*.
https://www.heinnovate.eu/en
European Commission. (n.d.). *Horizon Dashboard*.
https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/horizon-dashboard
Joint Research Centre. (2023). *Standardisation in Knowledge Valorisation – Science for Policy Report*.
https://op.europa.eu/de/publication-detail/-/publication/14e669cb-fbae-11ee-a251-01aa75ed71a1/language-en



The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

## *8.2. Training Resources, Projects, and Platforms (Best Practice Sources)*

ANEC. (n.d.). *Training and Policy Resources*.
https://www.anec.eu/
ASTP. (n.d.). *Training & Events*.
https://www.astp4kt.eu/training/
CEN-CENELEC. (n.d.). *Training Resources and Webinars*.
https://www.cencenelec.eu/news-and-events/events/webinars/
CEETNOVA. (n.d.). *Pre-Diagnostic IP Tool*.
https://www.ceettna.fr/pre-diagnostic-ip/
CODAU. (n.d.). *Homepage of the Conference of University General Directors in Italy*.
https://www.codau.it/
COST. (n.d.). *COST Academy Training Portal*.
https://www.cost.eu/funding/how-to-get-funding/cost-academy/
DIN Akademie. (n.d.). *Trainings and Webinars*.
https://www.din-akademie.de/
ECOS. (n.d.). *Standards for Sustainability Training*.
https://ecostandard.org/
EDU4Standards. (n.d.). *EDU4Standards Project Website*.
https://edu4standards.eu/
EFIS Centre. (n.d.). *Standardisation in Research Projects*.
https://www.efiscentre.eu/standardisation
European IP Helpdesk. (n.d.). *Official Website*.
https://intellectual-property-helpdesk.ec.europa.eu/
ETSI. (n.d.). *ETSI Webinars and Courses*.
https://www.etsi.org/events/etsi-webinars
HSBooster.eu. (n.d.). *HSBooster Academy*.
https://www.hsbooster.eu/academy
IGLO. (n.d.). *IGLO Network*.
https://www.iglortd.org/
IMPAC3TIP. (n.d.). *About the Project*.
https://www.impac3tip.eu/about/
Impact Licensing Initiative. (n.d.). *Official Website*.
https://impactlicensing.eu/
ISO. (n.d.). *ISO Training Academy*.
https://academy.iso.org/
KTH Innovation. (n.d.). *Innovation Readiness Level Framework*.
https://kthinnovationreadinesslevel.com/
REVALORISE+. (n.d.). *Official Website*.
https://revalorise.eu/
SeeBlocks. (n.d.). *Training Academy*.
https://seeblocks.eu/training-academy

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

StandICT.eu. (n.d.). *Official Website*.
https://www.standict.eu/
THRIVE Institute. (n.d.). *Official Website*.
https://thrive.institute/
Zoom4EU. (n.d.). *Zoom4EU Toolkit Platform*.
https://zoom4u.eu/
EU NCP Portal. (n.d.). *Training Resources Portal*.
https://horizoneuropencpportal.eu/store
Horizon Europe NCP Portal. (n.d.). *Technology Readiness Level (TRL) Assessment Tool*.
https://horizoneuropencpportal.eu/store/trl-assessment

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

# 9. Annexes

- **Annex A** – Best Practice Collection
- **Annex B** – Interviews
  - B.1 Interviewee Profile and Questions Guide
  - B.2 List of Interviewees
  - [B.3 Full Interview Transcripts available if needed]

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.

| | *Name* | *Partner/Activity* | *Date* |
|---|---|---|---|
| From: | Claire Fritz | EURICE | 29.07.2025 |
| Moderated by: | Claire Fritz | EURICE | 29.07.2025 |
| Reviewed by | Hana Kosova | ASTP | 28.07.2025 |
| | Ivana Mijatovic | UBFON | 29.07.2025 |
| | Lucija Rogina | RISE | 29.07.2025 |
| | Jörg Scherer | EURICE | 30.07.2025 |
| Approved by: | Andrea Di Anselmo | META | 30.07.2025 |

The IAM4RE.eu has received funding from the European Union's Horizon Europe Framework Programme (HORIZON) - under grant agreement no 101206372.