ADVANCED CODING

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 ACG-NBA.1C.d.OPT.M.A

Area Information Systems and Technology

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MARIANO ALVAREZ DIENTE**

E-mail: mad2@faculty.ie.edu

Academic Background

Graduate and Master in Telecommunication Engineer, Universidad de Valladolid

Graduate and Master in Literary Theory and Comparative Literature, Universidad de Valladolid.

Master in E.S.O, Bachillerato, Professional training and languages teaching.

Master in Philological studies: professional/business applications.

Academic experience

Bachelor in Business Administration at IE University. Since 2010.

Bachelor in Information Systems and Computer Science. Since 2017.

Currently, Instructor at IBM Global Services on Internetworking and Information and Telecommunication Technologies. Since 2004.

Courses taught at IBM:

Big Data & Analytics

Mobile & corporate strategy

New technologies in communications

WLAN networks implementation

WLAN security

WiMAX technology

TCP/IP fundamentals

Networks Implementation & administration

IP Telephony (VoIP).

IoT (IBM Cloud)

Professional experience

Currently. Freelance. Telecommunication and Information Technologies projects.
Currently. Instructor at IBM Global Services
Engineer in Acoustics. Acoustic municipal centre Hall of Valladolid
Solyven S.L. Solar energy projects.

Office hours: Live tutorials available by previous appointment.
Contact details: e-mail: mad2@faculty.ie.edu

PREREQUISITES

The only prerequisite for this course is to have passed the course for Introduction to programming before taking this course.

SUBJECT DESCRIPTION

Building on top of some basic programming knowledge (loops, if/else, functions, files, etc...), this course expands this knowledge with the most common Python modules: Numpy arrays, Pandas, Matplotlib, Flask, Request...

On the other hand, we will also introduce the use of APIs, extend data collections, dive into OOP and approach the use of search, sorting and recursion algorithms.

LEARNING OBJECTIVES

In this course you will learn how to use Python's advanced modules to extract business knowledge from data including:

- Creating and manipulating arrays using the Numpy module

- Bulding dataframe data structures using Pandas

- Crafting visualizations using matplotlib

- GUI interface

- Developing programs using the OOP approach

- Learning about network interactions: APIs, HTTP, Flask

- Looking at searching, sorting and recursion algorithms.

TEACHING METHODOLOGY

The course is mainly a practical hands-on course. During the sessions we will mix theoretical lecturing with practical assignments. The course is designed for you to always have a laptop with you in class so you can code directly the exercises during the sessions.

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	20.0 hours
Discussions	16.67 %	25.0 hours
Exercises in class, Asynchronous sessions, Field Work	30.0 %	45.0 hours
Group work	20.0 %	30.0 hours
Individual studying	20.0 %	30.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Introduction to Python.

In these two sessions we will review the main characteristics of the Python programming language (variables, loops, conditional statements, files, functions) as a reminder from the previous course.

SESSIONS 3 - 4 (LIVE IN-PERSON)

Exercises to reinforce the content reviewed in the previous sessions.

Double session

SESSIONS 5 - 6 (LIVE IN-PERSON)

Simulation and design

The potential applications of simulation as a way to solve real-world problems. We will learn how to think in order to simplify our developments.

SESSIONS 7 - 8 (LIVE IN-PERSON)

Classes

How defining classes can provide structures to make complex programs

SESSIONS 9 - 10 (LIVE IN-PERSON)

Data Collections I

Understanding the use of lists (arrays), dictionaries and tuples to represent a collection of related data. Also dictionaries and CSV and JSON formats.

SESSIONS 11 - 12 (LIVE IN-PERSON)

Data Collections II

The use of CSV and JSON formats to facilitate the exchange of data

SESSION 13 (LIVE IN-PERSON)

Practice the content from sessions 5 to 12.

SESSION 14 (LIVE IN-PERSON)

Midterm exam

SESSIONS 15 - 16 (LIVE IN-PERSON)

Object Oriented Programming

How to apply the use of inheritance, encapsulation and polymorphism in order to reuse code for efficient coding.

SESSIONS 17 - 18 (LIVE IN-PERSON)

Graphics Interfaces: Introduction to Tkinter

In these sessions we will learn the fundamentals of Tkinter, the standard GUI library for Python. Python when combined with Tkinter provides a fast and easy way to create GUI applications. Tkinter provides a powerful object-oriented interface to the Tk GUI toolkit.

SESSIONS 19 - 20 (LIVE IN-PERSON)

Numpy and Pandas I

In this session we will introduce the NumPy library, that provides a simple yet powerful data structure: the n-dimensional array. This is the foundation on which almost all the power of Python's data science toolkit is built. Learning NumPy is the first step on any Python data scientist's journey.

SESSIONS 21 - 22 (LIVE IN-PERSON)

Numpy and Pandas II

In this session we will introduce the Pandas library. Pandas is a powerful and flexible Python package that allows you to work with labeled and time series data. It also provides statistics methods, enables plotting, and more. One crucial feature of Pandas is its ability to write and read Excel, CSV, and many other types of files.

SESSION 23 (LIVE IN-PERSON)

Practical Session

Practice the content from sessions 15 to 22.

SESSIONS 24 - 25 (LIVE IN-PERSON)

Data visualizations in matplotlib.

In these sessions we will review the use of matplotlib for visualizations.

SESSIONS 26 - 27 (LIVE IN-PERSON)

Web development frameworks: Flask

HTTP, using APIs, Web scraping

In these sessions we will introduce Flask, a Python module that lets you develop web applications easily thanks to a small and easy-to-extend core.

We will also learn the process of collecting and parsing raw data from the Web. We will also learn the fundamentals of exchanging information through networks

SESSIONS 28 - 29 (LIVE IN-PERSON)

Practical Session and Final presentation

Wrapping-up all material seen in the course.

SESSION 30 (LIVE IN-PERSON)

Final Exam

EVALUATION CRITERIA

Your final grade in the course will be based on exams and the final team work that will be weighted in the following way:

criteria	percentage	Learning Objectives	Comments
Final Exam	30 %		Final exam in session 30
Intermediate tests	20 %		Midterm exam in session 14
Group Work	30 %		Final challenge in teams
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

A. CLASS PARTICIPATION

Three main criteria will be used in reaching judgment about your class participation:

- Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

- Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

- Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

B. WORKGROUPS

During the course you will work with your group in order to develop a final assignment.

C. GROUP FINAL PRESENTATION
In the last session of the course you will need to present and share with your classmates.

RE-SIT / RE-TAKE POLICY
Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

Regarding to the newly implemented ´liquid learning´ model, all students must still abide by the same IEU attendance policy, including those students who are connecting remotely to class sessions and not physically in the classroom because they are unable to be physically in Spain, on campus. During the sessions, students connecting remotely are required to fully connect their camera and microphone at all times, and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or

deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade

for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-

enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is

10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the

June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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ADVANCED CORPORATE FINANCE

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 ACF-NBA.1C.f.OPT.M.A

Area Finance

Number of sessions: 25

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 5.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JORGE MERLADET ARTIACH**

E-mail: jmerladet@faculty.ie.edu

Jorge Merladet worked at first in the financial markets as an equity and fixed income research analyst and then as the head of equity research department of an investment bank in Spain. As a manager of the firm, Jorge contributed to re-shape a formerly wealth management firm into a wide scope dealer in cash, derivative and M&A markets, gaining licences to operate, gaining new clients, increasing revenues and advising corporates in their IPOs, takeovers and private equity deals.

From 2001, he became CEO of a privately held company. Jorge led two private equity rounds and then the successful IPO of his company in 2005. After that, he has been appointed director at the boards of different companies and advisor to the board for strategic and finance matters and he has played a major role in the expansion and in the restructuring of different businesses as well as in their sale to national and international investors.

Office hours will be held on Zoom Mondays 8 pm: https://ieuniversity.zoom.us/j/96125201486?pwd=b2xrQk9qTVlMNEd0dFdqbDFZOFhZZz09

PREREQUISITES

Corporate Finance and Capital Markets and compulsory subjects in the Finance track that you will have taken and that will be very useful for our course. Good Excel skills are also necessary.

SUBJECT DESCRIPTION

In our course, our students have already studied an introductory course to Corporate Finance and an introductory course to Capital Markets. The already own the basic instruments: NPV & IRR, Fixed Income basics, Portfolio Theory, Equity Markets and basic Derivative Markets. Now is time to put them to work in managing your company.

LEARNING OBJECTIVES

From the perspective of the CFO or the CEO we will address their use for:

- Financial analysis and planning.
- Debt Financing and Risk Management.
- Issuing Equities and Valuation.
- Incentives and limits to debt financing and restructuring.

All along the course, we will be connecting finance from the corporate perspective and the markets, understanding how can the decision maker better defend the interest of his/her firm.

Towards the end of the course, we expect students to be prepared to solve a case study and prepare take aways from the course for discussion.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	25.0 hours
Discussions	20.0 %	25.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	25.0 hours
Group work	20.0 %	25.0 hours
Individual studying	20.0 %	25.0 hours
TOTAL	100.0 %	125.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Course Intro

FINANCIAL ANALYSIS AND PLANNING

SESSION 2 (LIVE IN-PERSON)

Financial Analysis

BMA Ch28

Book Chapters: Principles of corporate finance, Ch28 (See Bibliography)

SESSION 3 (LIVE IN-PERSON)

Financial Analysis

BMA Ch28

SESSION 4 (LIVE IN-PERSON)

Financial Planning and Management

BMA Ch29 & Ch30

Book Chapters: Principles of corporate finance, Ch29 & Ch30 (See Bibliography)

SESSION 5 (LIVE IN-PERSON)

Financial Planning and Management

BMA Ch29 & Ch30

SESSION 6 (LIVE IN-PERSON)

Exercises

DEBT FINANCING AND RISK MANAGEMENT

EQUITY FINANCING AND VALUATION

SESSION 7 (LIVE IN-PERSON)

Quiz

SESSION 8 (LIVE IN-PERSON)

Credit Risk and Corporate Debt

BMA Ch23 & Ch24

Book Chapters: Principles of corporate finance, Ch23 & Ch24 (See Bibliography)

RESTRUCTURING

SESSION 9 (LIVE IN-PERSON)

Credit Risk and Corporate Debt

BMA Ch23 & Ch24

CASE STUDIES

SESSION 10 (LIVE IN-PERSON)

Managing Risk and International Risks

BMA Ch26 & Ch27

Book Chapters: Principles of corporate finance, Ch26 & Ch27 (See Bibliography)

DISCUSSION

SESSION 11 (LIVE IN-PERSON)

Managing Risk and International Risks

BMA Ch26 & Ch27

SESSION 12 (LIVE IN-PERSON)

Valuation

BMA Ch4

Book Chapters: Principles of corporate finance, Ch4 (See Bibliography)

SESSION 13 (LIVE IN-PERSON)

Valuation

BMA Ch4

SESSION 14 (LIVE IN-PERSON)

Issuing equities: Venture Capital, Private Equity, IPO

Case study presentation

BMA Ch15, 32.1-2

Book Chapters: Principles of corporate finance, Ch15, 32.1-2 (See Bibliography)

SESSION 15 (LIVE IN-PERSON)

Issuing equities: Venture Capital, Private Equity, IPO

Case study presentation

BMA Ch15, 32.1-2

SESSION 16 (LIVE IN-PERSON)

Quiz

SESSION 17 (LIVE IN-PERSON)

Tax, Financing and Valuation
BMA Ch18 and Ch19
Book Chapters: Principles of corporate finance, Ch18 and Ch19 (See Bibliography)

SESSION 18 (LIVE IN-PERSON)

Tax, Financing and Valuation
BMA Ch18 and Ch19

SESSION 19 (LIVE IN-PERSON)

Management incentives and monitoring. Corporate social responsibility.
BMA Ch12.1-12.3
Book Chapters: Principles of corporate finance, Ch12.1-12.3 (See Bibliography)

SESSION 20 (LIVE IN-PERSON)

The cost of Financial Distress and Corporate Restructuring
BMA Ch18.3 & Ch32.4
Book Chapters: Principles of corporate finance, Ch18.3 & Ch32.4 (See Bibliography)

SESSION 21 (LIVE IN-PERSON)

Case Study: Quintiles IPO
Case Study: Can Apax Partners Salvage This BuyOut?
Practical Case: Quintiles IPO (HBS KEL843-PDF-ENG)
Practical Case: Cengage Learning: Can Apax Partners Salvage This Buyout? (HBS UV6926-PDF-ENG)

SESSION 22 (LIVE IN-PERSON)

Case Study: Quintiles IPO
Case Study: Can Apax Partners Salvage This BuyOut?

SESSION 23 (LIVE IN-PERSON)

Case Study: Quintiles IPO
Case Study: Can Apax Partners Salvage This BuyOut?

SESSION 24 (LIVE IN-PERSON)

Corporate and market perspectives of finance: take aways.
Student presentations and discussion.

SESSION 25 (LIVE IN-PERSON)

Corporate and market perspectives of finance: take aways.

Student presentations and discussion.

EVALUATION CRITERIA

Evaluation will be aligned with the course methodology to encourage collaborative, active and applied work. Every student will be asked to defend his/her views, and is expected to participate. Creative solutions will be welcome and we will be glad to consider even the least plausible alternative.

As the course advances, higher consistency of the proposals is expected, but there is no right or wrong. Sharing personal views and proposed actions will enrich every one of the participants.

Consequently, each of the students will be working in groups. Group and individual work will be assessed based on:

- The student performance in two intermediate quizzes
- The discussion of two case studies and the prep work done in groups
- The presentation of take aways for open discussion at the end of the course.
- Individual session prep and Q&A all along the course

criteria	percentage	Learning Objectives	Comments
Quizzes	25 %		
Reading and session preparation	15 %		
Group Work	25 %		
Take-aways Presentation and Discussion	25 %		
Class Participation	10 %		

RE-SIT / RE-TAKE POLICY

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Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

As a result of IE's ´liquid learning´ model, all students must abide to the attendance policy for AY 2021-22 where physical (in-person) attendance to class is compulsory for all regular Face-to-Face courses. Those students who, due to exceptional cases (that have been pre-approved by IE), are connecting remotely to class sessions and not physically in the classroom are required to fully connect their camera and microphone at all times , and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

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trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

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BIBLIOGRAPHY

Compulsory

- Richard A. Brealey, Stewart C. Myers, Franklin Allen, Alex Edmans (BMA). (2023). *Principles of corporate finance.* 14th edition. McGraw Hill. ISBN 9781265074159 (Digital)

  Only Connect Access through:

  https://connect.mheducation.com/class/j-merladet-2023---a

Recommended

- Damodaran, A. (2012. *Investment valuation.* Wiley. ISBN 9781118206560 (Printed)

BEHAVIOR RULES

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ATTENDANCE POLICY

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ADVANCED DATA ANALYTICS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 ADA-NBA.1C.s.OPT.M.A

Area Operations and Business Analytics

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MARÍA VICTORIA RIVAS LÓPEZ**

E-mail: mrivas@faculty.ie.edu

Maria Victoria Rivas López, PhD.

I am an expert in data science to support business decisions. My career is focused on teaching and doing research in disciplines of econometrics, statistics, actuarial science, financial mathematics and datamining.

PhD in Actuarial Science and Reseacher at Havard, Columbia University, Berkely and HKU.

mvrivas@faculty.ie.edu
I encourage all of my students to reach out to me via email with any questions, concerns, or to discuss course-related matters. I'm here to support your learning journey and provide guidance outside of class. Please feel free to contact me, and I'll do my best to respond in a timely manner. I look forward to hearing from you and fostering an open line of communication throughout the semester.

PREREQUISITES

Students need to be familiar with basic concepts of descriptive statistics, inference and hypothesis testing, as well as with the multiple linear regression model.

SUBJECT DESCRIPTION

Edited by Documentation
06th September 2023

Forecasting is embedded in all our planning activities from the beginning of our history. All socioeconomic issues of the day require some level of prediction. Planning and preparing for the future requires some forecasting because today's decisions are functions of what we can foresee today. The users of forecasts are firms, consumers, investors, government, etc. Models, by construction, are limited representations of the economic and business environments, but they will help us to take more objective decisions about the future strategies and not based them only on our experience and intuition.

LEARNING OBJECTIVES

- The course's main objective is to provide studentswith a working methodology and a solid knowledgebase for the use of forecasting models and econometric techniques in the areas of businessand economics.
- Students will learn how to identify and how to use properly one of the most well-known family of forecasting linear models.
- Additionally, students will learn how to use R, one of the most powerful software used for economic and financial applications in major companies all around the world, in the context of time series analysis.

TEACHING METHODOLOGY

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Individual studying	15.33 %	23.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

LESSON 1: INTRODUCTION TO FORECASTING

1. What is forecasting?

2. Features of a Time Series

3. Basic notation and the objective of the Forecaster

4. The basic steps in a forecasting task

5. The statistical forecasting perspective

SESSION 2 (LIVE IN-PERSON)

LESSON 2: PROGRAMMING with R – an introduction

1. R Studio

2. Important Libraries in R

3. Reading data into R

4. Writing data into an excel file

5. Basic statistics and useful plots

6. Random number generation

7. Regression Analysis with R

R/ R-Studio:

Other / Complementary Documentation: R-4.3.1 for Windows

Other / Complementary Documentation: RStudio Desktop

Other / Complementary Documentation: An Introduction to R

SESSION 3 (LIVE IN-PERSON)

LESSON 2: PROGRAMMING with R – an introduction (cont.)

1. R Studio

2. Important Libraries in R

3. Reading data into R

4. Writing data into an excel file

5. Basic statistics and useful plots

6. Random number generation

7. Regression Analytis with R

SESSION 4 (LIVE IN-PERSON)

Lesson 3: REVIEW OF THE LINEAR REGRESSION MODEL (Chapter 2. Gloria González-Rivera)

1. Conditional Density and Conditional Moments

2. Linear Regression Model

3. Estimation: Ordinary Least Squares

4. R-squared and Adjusted R-squared

5. Linearity and OLS

6. Assumptions of OLS: The Gauss-Markov Theorem

7. An Example: House Prices and Interest Rates

8. Hypothesis Testing in a Regression Model

9. The t-ratio

10. The F-test

SESSION 5 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 3 using R Studio Program.

SESSION 6 (LIVE IN-PERSON)

LESSON 4 STATISTICS AND TIME SERIES

1. Stochastic Process and Time Series
2. Time Series
3. The Interpretation of a Time Average
4. Stationarity
5. Useful Transformations of Non-stationary Processes
6. A New Tool of Analysis: The Autocorrelation Functions
7. Partial Autocorrelation
8. Statistical Tests for Autocorrelation Coefficients
9. Conditional Moments and Time Series: What Lies Ahead

SESSION 7 (LIVE IN-PERSON)

LESSON 5 TIME SERIES GRAPHICS IN R (Chapter 2.Rob J, Hyndman and George Athanasopoulos)

1. ts objects
2. Time plots
3. Time series patterns
4. Seasonal plots
5. Seasonal subseries plots
6. Scatterplots
7. Lag plots
8. Autocorrelation
9. White noise

SESSION 8 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop practical cases based on lessons 4 and 5 using R Studio Program.

SESSION 9 (LIVE IN-PERSON)

LESSON 6 Tools of the Forecaster

1. The Information Set
2. Some Information Sets Are More Valuable Than Others
3. Some Time Series Are More Forecastable Than Others
4. The Forecast Horizon
5. Forecasting Environments
6. The Loss Function
7. Some Examples of Loss Functions
8. Optimal Forecast: An Introduction

9. A pause where are we and where are we going?

SESSION 10 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 6 using R Studio Program.

SESSION 11 (LIVE IN-PERSON)

LESSON 7 Forecasting with Moving Average (MA) Processes

1. A Model with No Dependence: White Noise
2. What Does This Process Look Like?
3. The Wold Decomposition Theorem: The Origin of AR and MA Models
4. Finite Representation of the Wold Decomposition
5. Forecasting with Moving Average Models
6. MA(1) Process
7. MA(q) Process

SESSION 12 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 7 using R Studio Program.

SESSION 13 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 7 using R Studio Program. (cont)

SESSION 14 (LIVE IN-PERSON)

LESSON 8 Forecasting with Autoregressive (AR) Processes

1. Cycles
2. Autoregressive Models
3. The AR(1) Process
4. AR(2) Process
5. AR(p) Process
6. Chain Rule of Forecasting
7. Seasonal Cycles
8. Deterministic and Stochastic Seasonal Cycles

9. Seasonal ARMA Models
10. Combining ARMA and Seasonal ARMA Models

SESSION 15 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 8 using R Studio Program.

SESSION 16 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 8 using R Studio Program.
MID-TERM EXAM

SESSION 17 (LIVE IN-PERSON)

LESSON 9 Forecasting Practice I

    1 The Data: San Diego House Price Index
    2 Model Selection
    3 The Forecast
    4 Who Are the Consumers of Forecasts?
    5 Is It Possible To Have Different Forecasts from the Same Model?
    6 What Is the Most Common Loss Function in Economics and Business?

SESSION 18 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 9 using R Studio Program.

SESSION 19 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 9 using R Studio Program.

SESSION 20 (LIVE IN-PERSON)

LESSON 10 Forecasting Practice II: Assessment of Forecasts and Combination of Forecasts

    1 Optimal Forecast
    2.Symmetric and Asymmetric Loss Functions
    3 Testing the Optimality of the Forecast
    4 Assessment of Forecasts
    5 Descriptive Evaluation of the Average Loss
    6 Statistical Evaluation of the Average Loss
    7 Combination of Forecasts
    8 Simple Linear Combinations
    9 Optimal Linear Combinations

SESSION 21 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 10 using R Studio Program.

SESSION 22 (LIVE IN-PERSON)

LESSON 11 Forecasting the Long Term: Deterministic and Stochastic Trends

1. Deterministic Trends
2 Trend Shapes
3.Trend Stationarity
4. Optimal Forecast
5.Stochastic Trends
6. Trend Shapes
7. Stationarity Properties
8. Optimal Forecast

SESSION 23 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 11 using R Studio Program.

SESSION 24 (LIVE IN-PERSON)

LESSSON 12 Forecasting with a System of Equations: Vector Autoregression

1. What Is Vector Autoregression (VAR)?
2. Estimation of VAR
3. Granger Causality
4. Impulse-Response Functions
5. Forecasting with VAR

SESSION 25 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop a practical case based on lesson 12 using R Studio Program.

SESSION 26 (LIVE IN-PERSON)

CHAPTER 13 Forecasting the Long Term and the Short Term Jointly

1. Finding a Long-Term Equilibrium Relationship
2. Quantifying Short-Term Dynamics: Vector Error Correction Model
3. Constructing the Forecast

SESSION 27 (LIVE IN-PERSON)

LESSON 14 Forecasting Volatility I

1. Motivation
2. The World is Concerned About Uncertainty
3. Volatility Within the Context of Our Forecasting Problem
4.Setting the Objective
5.Time-Varying Dispersion: Empirical Evidence
6. Is There Time Dependence in Volatility?
7. What Have We Learned So Far?
8. Simple Specifications for the Conditional Variance
9. Rolling Window Volatility
10. Exponentially Weighted Moving Average (EWMA) Volatility

SESSION 28 (LIVE IN-PERSON)

LESSON 15 Forecasting Volatility II

 1. The ARCH Family
 2. ARCH(1)
 3. ARCH(p)
 4. GARCH(1,1)
 5.Estimation Issues for the ARCH Family
 6. Realized Volatility

SESSION 29 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop practical cases based on lesson 13,14,15 using R Studio Program.

SESSION 30 (LIVE IN-PERSON)

PRACTICAL CASE

The students are going to develop practical cases based on lesson 13,14,15 using R Studio Program.

EVALUATION CRITERIA

The assessment system, in the ordinary sitting, will have the following compulsory rubrics:

- – 10% of the student's final grade: individual assignments (continuous assessment through tests and practical exercises).
- – 40% of the student's final grade: group work (theoretical-practical) is to be carried out during the course in Word and Power point, making use of the corresponding software (R Studio Program). The groups will be made up of a maximum of 4 students. Students are going to present the group work: Forecasting data science project
- – 50% of the student's final grade: two individual theoretical-practical tests will be completed (without notes) on the specified dates. A minimum average grade of 4 out of 10 must be obtained in the tests in order to pass the subject. If the minimum grade of 4 is not obtained, a weighted average including all other assignments will not be calculated, and the final grade of the subject will be the average grade of the two tests.
- – The assessment system in the extraordinary sitting is the same as that of the ordinary sitting.

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		
Individual Work	10 %		
Group Work	40 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

As a result of IE's ´liquid learning´ model, all students must abide to the attendance policy for AY 2021-22 where physical (in-person) attendance to class is compulsory for all regular Face-to-Face courses. Those students who, due to exceptional cases (that have been pre-approved by IE), are connecting remotely to class sessions and not physically in the classroom are required to fully connect their camera and microphone at all times , and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- Rob J, Hyndman, George Athanasopoulos. *Forecasting: Principles and Practice.*
2. Text. ISBN 978098750711 (Digital)
https://otexts.com/fpp2/buy-a-print-or-downloadable-version.html

- Gloria González-Rivera. (2012). *Forecasting for Economics and Business.* 1. The Pearson Series in Economics. ISBN 0131474936 (Digital)

Recommended

 - Tsay, R. (2013). *An Introduction to Analysis of Financial Data with R.* 1. Wiley. ISBN 0470890819 (Digital)

BEHAVIOR RULES

Please, check the University's Code of Conduct [here](). The Program Director may provide further indications.

ATTENDANCE POLICY

Please, check the University's Attendance Policy [here](). The Program Director may provide further indications.

ETHICAL POLICY

Please, check the University's Ethics Code [here](). The Program Director may provide further indications.

AGILE METHODOLOGIES: RUNNING BUSINESS INNOVATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 AMRBI-NBA.1C.s.OPT.M.A

Area Design and Management

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MARCOS EGUILLOR FERNANDEZ**

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Senior digital business executive & entrepreneur. Investor, advisor and director.

Innovation | Transformation | Digital | Optimist.

Marcos has worked in the digital arena since 1999, in the Internet, telco, mobile devices, apps, software, Internet of Things, media and broadcast, videogames, esports, social media and content, gamification, elearning, crisis communication, education, events and consulting verticals, among others.

He has played international leading roles in innovation, digital transformation, product/services design, development and standardisation. He has also got leading responsibilities in corporate and business development and project management.

He is a serial entrepreneur, investor, mentor, advisor and director in multiple ventures. He is a cofounder and head of revenue of vidiv, online platform for mass events, and MAD Lions esports club (acquired by the Canadian OverActive Media group). Also, a co-founder and president of Barbara IoT, a deep tech company with a focus on IoT and cybersecurity. Further, founder of the Innovation as a Service resultancy firm BinaryKnowledge_, and cofounder of IdeaFoster, innovation agency acquired by the Peruvian company Canvia.

Marcos is a member of the Spanish Institute of Directors-Administrators (IC-A). He has worked in international organizations, being a member of the board of the Open Mobile Alliance (OMA) on behalf of the Telefónica Group, a member of the Spanish Association of Telecommunications Engineers (COIT-AEIT) and a representative member before the Spanish Engineering Institute (IIE). In addition, he has been a member of the committee and vice-president of the Spanish Red Cross in Madrid, a member of the advisory board of the IMAN Foundation or a member of the Internet of Things Council.

He is an independent consultant and evaluator of FP7 and Horizon2020 calls of the European Commission.

As an educator and speaker, he is an adjunct professor at IE Business School, Headspring (joint-venture with Financial Times that delivers in-company programs) and other institutions. Furthermore, he has also extensively collaborated in hackathons, incubation and acceleration programs of many organizations.

He holds an MSc. in Telecommunication Engineering and an Executive MBA. He is a candidate PhD and Project Management Professional certified. Marcos received a Torres Quevedo grant as a researcher by the Ministry of Innovation and Science of Spain from 2010 to 2012. And he was awarded with Telefónica I+D Prize for Innovation in 1999 and recognized for excellence as professor and mentor at IE Business School and University several times.

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PREREQUISITES

Before this course, you must have attained fundamental basic knowledge of business, innovation, and management principles.

Ideally, you should have gained practical experience in a business setting.

SUBJECT DESCRIPTION

There is a humongous difference between ideas and execution.

Success is subject to making ideas happen. The first step is understanding what needs to be accomplished and taking decisive action. This process often demands precision, effectiveness and efficiency for repeatability. However, encountering situations where existing solutions are inadequate, there is no consolidated practice, or facing rapidly changing environments and requirements, can pose challenges. The key lies in assessing established methodologies in such circumstances and adapting.

This course empowers individuals personally and professionally, enabling them to thrive in fast-paced business environments with high expectations. It aims to accelerate your business acumen and equip you with the skills to navigate organizations, particularly in dynamic, demanding, innovative contexts.

LEARNING OBJECTIVES

The primary goal of this course is to assist you in acquiring the knowledge and skills necessary to excel both as an adept, efficient individual professional and as a valuable team member capable of overseeing intricate activities and projects.

Throughout this journey, you will have the opportunity to:

- Discover how to enhance your productivity.
- Comprehend the significance of mental models and organizational culture in managing

   activities and projects and overcoming obstacles.

- Recognize the importance of agility, lean principles, and customer-centricity.
- Explore various innovation strategies.
- Gain insights into viewpoints, methodologies, and tools that foster the realization of projects and innovation.
- Identify how Artificial Intelligence impacts the practice and how to integrate it effectively.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course.

The course follows a collaborative co-creation approach, with students responsible for preparing and defending relevant topics individually and in teams. It focuses on essential aspects such as business, organizational culture, performance, and productivity.

The course offers a balanced learning experience combining individual study, teamwork, lectures, presentations, debates, and practical assignments.

Sessions are designed for engagement and collaboration, with a practical and conversational focus. They are supported by the introduction of fundamental theoretical concepts, the application of tools and methodologies, reviewing outcomes, and the inclusion of real cases for open discussion.

Don't hesitate to ask if you have any doubts. Taking responsibility for your learning is essential, so make the most of it. If you have questions about the course, please first refer to the syllabus, announcements, and introductory session instructions. Submit your questions to the appropriate threads on the Online Campus so that everyone can benefit from the answers. Please refrain from sending questions via email.

This is done by engaging in a diverse range of teaching techniques and different types of learning activities, such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	26.67 %	20.0 hours
Group work	33.33 %	25.0 hours
Individual studying	13.33 %	10.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

INTRODUCTION TO THE COURSE

Objectives:

- Introduce the course: Objectives, methodology, requirements, rules and evaluation criteria. Set expectations.

- Welcome talent and know about their objectives, interests, skills and mindset.

Get ready for the session:

- Read the syllabus.
- Watch: Start with why - how great leaders inspire action | Simon Sinek | TEDxPugetSound. https://youtu.be/u4ZoJKF_VuA
- Watch: Guy Kawasaki "The Art of the Start" @ TiECon 2006. https://youtu.be/jSlwuafyUUo
- Prepare your questions.
- During the session:

Introduce the course.

- Review the syllabus.
- Create the groups.
- Open discussion.
- Q&A.

After the session:

- Start working on the preparation of your corresponding Team topic.

Assignment:

- Team topic. Deliver it by your corresponding session. Graded as Team topic.

Multimedia Material: Start with why - how great leaders inspire action | Simon Sinek | TEDxPugetSound (YouTube)

Multimedia Material: Guy Kawasaki "The Art of the Start" @ TiECon 2006 (YouTube)

SESSION 2 (LIVE IN-PERSON)

WHY AGILE AND LEAN INNOVATION ARE CRITICAL TO SUCCESS?

Objectives:

- Introduce the case for agile and lean innovation.

Get ready for the session:

- -.

During the session:

- VUCA, BANI, exponential environments and mental models. Emerging technologies. Innovation waves. Trends and foresight.
- Disruption. The 6 D's Disruption Framework.
- Data, Digital strategy and Digital Transformation. The digitalisation ladder.
- Open discussion.
- Q&A.

After the session:

- -.

Assignment:

- -.

SESSION 3 (LIVE IN-PERSON)

FROM IDEAS TO EXECUTION, A COMMON GROUND FOR UNDERSTANDING

Objectives:

- Frame and distil basic concepts about work systems.
- Establish a common ground of understanding and basis for the rest of the course.

Get ready for the session:

- -.

During the session:

- Discuss the meaning and differences between idea, invention and innovation; company and organisation; system, model, methodology, technique and tool; objective, strategy, process, tactic and result; effectiveness, efficacy and efficiency; feasibility and viability; program, project, plan task and project management; productivity; mental model, skill and competence; metric and KPI; value, behaviour and habit; decision, implementation, and execution…
- Waterfall vs. agile approaches. Innovation; agile and lean vs. traditional.
- Analyse the concept of innovation, its types and challenges.
- Open discussion.
- Q&A.

After the session:

- -.

Assignment:

- -.

SESSION 4 (LIVE IN-PERSON)

PERSONAL PRODUCTIVITY, A FUNDAMENTAL STARTING POINT

Objectives:

- Introduce the case for personal productivity as an essential enabling element of business efficacy and efficiency.
- Identify and analyse personal productivity methodologies.
- Identify and improve the personal productivity habits and tools of the participants.

Get ready for the session:

- Reflect on your personal productivity traits, habits and results.

During the session:

- Introduction to personal productivity. What is and what is not. Principles and mental models. The impact of meditation.
- Know and understand personal productivity methodologies and techniques such as Pomodoro, Timeboxing, Personal Kanban, GTD and others.
- Open discussion.
- Q&A.

After the session:

- Reflect on the outcome.
- Start working on your Personal Productivity Plan.

Assignment:

- Personal Productivity Plan. Deliver it before SESSION 15. FINAL EXAM. Graded as Personal Productivity Plan.

SESSION 5 (LIVE IN-PERSON)

HOW TO INNOVATE: INNOVATION FOCUS AND EXECUTION STRATEGY

Objectives:

- Understand the importance of focused and agile innovation and how to make it happen; the Lean Innovation Map.
- Know and understand different types of innovation execution strategies.

Get ready for the session:

- -.

During the session:

- Introduction to the Lean Innovation Map.
- Review of different innovation execution strategies: exploration, contracting, cooperation, intrapreneurship, entrepreneurship, corporate venturing, etc.
- Open discussion.
- Q&A.

After the session:

- -.

Assignment:

- -.

SESSION 6 (LIVE IN-PERSON)

AGILITY AND LEAN, AT THE HEART OF INNOVATION

Objectives:

- Understand the concepts of agility and lean, their origin and their impact on business and innovation.

Get ready for the session:

- -.

During the session:

- Review of historic industrial production methodologies: Arts & crafts, Taylorism, Fordism, lean manufacturing, JIT, TPS, Mc Donalds Speedee…
- Introduction to Agility. The Agile Manifest. Problem solving, Human Centered Design and the Double Diamond Design Process.
- Introduction to Lean.
- Alternative methodologies.
- Open discussion.
- Q&A.

After the session:

- -.

Assignment:

- -.

SESSION 7 (LIVE IN-PERSON)

CUSTOMER CENTRICITY AND DESIGN THINKING; CRITICAL COMPANIONS

Objectives:

- Introduce the Customer Experience and Customer Centricity concepts.
- Know and understand Design Thinking. Tools for idea generation, evaluation, validation and prioritisation.

Get ready for the session:

- Watch: IDEO: Shopping Cart Design Process. https://youtu.be/izjhx17NuSE

During the session:

- Analyse the meaning and impact of the Customer Experience and Customer Centricity.
- Introduction to Design Thinking.
- Open discussion.
- Q&A.

After the session:

- Start working on the Design Thinking Project.

Assignment:

- Design Thinking Project. Deliver it before SESSION 13. DESIGN THINKING PROJECT PITCH. Graded as Design Thinking Project.

Multimedia Material: IDEO: Shopping Cart Design Process (YouTube)

SESSION 8 (LIVE IN-PERSON)

ENTREPRENEURIAL FRAMEWORKS: LEAN STARTUP, CUSTOMER DEVELOPMENT AND ENTREPRENEURIAL OS

Objectives:

- Review the Lean Startup and the Customer Development principles and basic concepts.
- Know and understand the Entrepreneurial Operating System.

Get ready for the session:

- Review your notes from previous entrepreneurship courses.

During the session:

- Introduction to Lean Startup and Customer Development.
- Introduction to the Entrepreneurial OS.
- Alternative methodologies.
- Open discussion.
- Q&A.

After the session:

- -.

Assignment:

- -.

SESSION 9 (LIVE IN-PERSON)

GOAL-SETTING METHODOLOGIES: OKRs

Objectives:

- Know and understand the goal-setting methodologies: OKRs.

Get ready for the session:

- -.
During the session:

- Introduction to OKRs.
- How to apply OKRs to personal productivity.
- Alternative methodologies.
- Open discussion.
- Q&A.

After the session:

- Continue working on your Personal Productivity Plan, including your personal OKRs.

Assignment:

- -.

SESSION 10 (LIVE IN-PERSON)

THE PROJECT MANAGEMENT PRACTICE: PMP AND PMI-ACP

Objectives:

- Know and understand the traditional waterfall approach to project management (PMP), and the agile version of it (PMI-ACP).
- Identify alternatives.

Get ready for the session:

- -.

During the session:

- The origin of the project management practice and different frameworks and certifications.
- Introduction to PMP.
- Introduction to PMI-ACP.
- Alternative methodologies.
- Open discussion.
- Q&A.

After the session:

- -.

Assignment:

- -.

SESSION 11 (LIVE IN-PERSON)

NEW APPROACHES TO THE PROJECT MANAGEMENT PRACTICE: SCRUM AND KANBAN

Objectives:

- Know and understand new approaches to project management: SCRUM and Kanban.

Get ready for the session:

- -.

During the session:

- Why other approaches to the project management practice are needed.
- Introduction to SCRUM. Roles, ceremonies and artifacts.
- Introduction to Kanban.

- Alternative methodologies.
- Open discussion.
- Q&A.

After the session:

- -.

Assignment:

- -.

SESSION 12 (LIVE IN-PERSON)

MINDSET, SKILLS, CULTURE AND ORGANISATIONAL DESIGN FOR INNOVATION

Objectives:

- Identify the mindset and skills needed to deliver and perform successfully in an innovative organisational environment.
- Understand the impact of organisational design on culture and performance and how agile may help improve both.

Get ready for the session:

- -.

During the session:

- Entrepreneurial mindset.
- Hard and soft skills for innovation.
- Culture and organisational design for innovation.
- Open discussion.
- Q&A.

After the sessions:

- -.

Assignments:

- -.

SESSION 13 (LIVE IN-PERSON)

DESIGN THINKING PROJECT PITCH

Objectives:

- Share the results of the teams' Design Thinking Project.

Get ready for the session:

- Prepare and rehearse your pitches and materials.

During the session:

- Host the teams pitching their results and provide feedback.
- Open discussion.
- Q&A.

After the session:

- -.

Assignments:

- -.

SESSION 14 (LIVE IN-PERSON)

INTEGRATING RESULTS AND CLOSING THE LOOP

Objectives:

- Analyse the outcome of the program's previous sessions, contributions and conversations to extract value and create a perspective.

Get ready for the session:

- Check the content of the previous sessions, contributions and conversations and elaborate your initial standpoint for the open discussion.
- Get ready to discuss and contribute.

During the session:

- Review of sessions, contributions, conversations, ideas and conclusions.
- Open discussion.
- Q&A.

After the session:

- Review the outcome of the session and get ready for the final exam.
- Finish your Personal Productivity Plan.

Assignments:

- -.

SESSION 15 (LIVE IN-PERSON)

FINAL EXAM

EVALUATION CRITERIA

Your performance will be assessed based on your results, the processes you follow, and your active participation and contribution to the learning process of the entire group.

During sessions, the professor will provide feedback on your ideas, projects, assignments, and progress. It aims to help you improve and progress. You should not resubmit modified versions for review once they are graded.

By participating in the course, all students implicitly consent to the use of their contributions and projects for educational purposes. All materials will be considered to be licensed under Creative Commons BY-NC-SA (Attribution – Non-Commercial – Share Alike). Refer to https://creativecommons.org/licenses/by-nc-sa/4.0/legalcode for further information.

Assignments will be available in advance on the Online Campus, complete with instructions and additional references. You are responsible for ensuring that you check for available assignments and submit them correctly for grading.

FINAL EXAM

It will comprise a test with 20 multiple-choice questions and two short essays (maximum 500 words each).

PERSONAL PRODUCTIVITY PLAN

This assignment is divided into two parts. Firstly, authors will assess their productivity performance. Following that, a guided process will aid in enhancing their focus and habits. Participants are expected to complete this process, utilizing additional tools and ideas acquired during the course.

PARTICIPATION AND CONTRIBUTION

Your active participation in both live sessions and on the Online Campus will be evaluated and graded. Attending alone will not earn you participation points.

To receive a positive grade, actively engage by sharing your views, doubts, concerns, thoughts, findings, conclusions, results, learnings, and experiences. Three main criteria will be used to evaluate your participation: Frequency, Depth, and Quality of contributions. Valuable comments are those that contribute meaningfully to the class's progress. Remember, participation is an ongoing effort, not a one-time occurrence. We encourage you to be open, communicative, and proactive.

On the Online Campus, written participation should be concise and to the point. When referencing online information or material, always cite the source and provide the link—avoid copying content.

Moreover, you will have the opportunity to earn points by contributing to the sessions by preparing small topics that have been agreed upon in advance with the professor.

Towards the conclusion of the course, it is essential to summarize and list all your individual contributions, sharing them with the professor for proper identification and grading.

TEAM TOPIC

Participants will be divided into teams, and each team will be assigned a specific topic to prepare and present during one of the sessions.

Furthermore, the teams are accountable for defending their assigned topic and linking it to other relevant discussions and themes throughout the entire course.

Towards the conclusion of the course, it is essential to summarize and list all your team contributions, sharing them with the professor for proper identification and grading.

DESIGN THINKING PROJECT

This team assignment revolves around product innovation, utilizing the Design Thinking methodology and tools to cater to a specific customer segment. Subsequently, teams will be required to present their outcomes through a pitch.

PEER EVALUATION

Each participant within the teams will evaluate their team members based on three key aspects:

- Teamwork spirit, and interaction.
- Workload assumed and contribution to the team's work.
- Quality of the work and strategic thinking.

Detailed instructions for conducting these evaluations will be provided at the end of the course.

Your final grade will be determined by combining individual and group work, each with its specific characteristics, weighted as follows:

criteria	percentage	Learning Objectives	Comments
Final Exam	20 %		Responsibility: Individual. Evaluated by: Professor
Personal Productivity Plan	10 %		Responsibility: Individual. Evaluated by: Professor
Peer evaluation	10 %		Responsibility: Individual. Evaluated by: Peers in the team
Design Thinking Project	20 %		Responsibility: Team. Evaluated by: Professor/Class

Team topic	20 %		Responsibility: Team. Evaluated by: Professor/Class
Participation and contribution	20 %		Responsibility: Individual. Evaluated by: Professor

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: One (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June/July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.).

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. Participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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BANKING & FINANCIAL MARKETS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 BFM-NBA.1C.f.OPT.M.A

Area Others

Number of sessions: 25

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 5.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JUAN PABLO JIMENO MORENO**

E-mail: jjimenom@faculty.ie.edu

Academic Background

- Master in Economy and Finance, CEMFI (Centro Estudios Monetarios y Financieros, Central Bank of Spain), Madrid, 1991-1993
- MSC in Industrial Engineering, Universidad Politecnica de Madrid, Madrid, 1985-1991

Academic Experience

- Author of the Book: Financial Markets and its Mathematics, Ariel (2004) and Delta (2012)
- Coauthor of the Book: Derivatives Instruments for Corporates, Delta (2013)
- Professor of Financial Markets, Asset Management, Derivatives… in Universidad Politecnica, Options&Futures Institute, IEB, Universidad Carlos III, Spain 1997-2012
- Adjunct Professor of Global Markets and International Financial Markets in IE, 2021-2023
- Associate Professor in Universidad Politecnica de Madrid, Spain, 2022

Corporate Experience

- Financial Consultant and member of some Boards and Advisory Boards. Professor, Spain, 2020-2023
- Head of Global Markets BBVA USA, USA, 2012-2020
- Chairman of BBVA Securities INC, USA, 2014-2020
- Head of BBVA Global Asset Management Business, Spain-LATAM, 2008-2012
- Head of BBVA Global Equities, Spain-Americas-LATAM, 1997-2008
- Equity Portfolio Manager Santander Investment, Spain, 1994-1997
    The professor will make himself available one hour after each of the sessions to provide feedback and respond doubts.

PREREQUISITES

An introductory or basic course of Finance that allows for the use of such concepts as: Present Value, Risk Measures (standard deviation and variance), calculations of a stock return, basic knowledge of stocks and bonds, etc.

SUBJECT DESCRIPTION

This course delivers an introduction to the banking sector and the financial markets. Regarding the banking sector, students will learn about its structure and functions, as well as its role in the economy. With reference to financial markets, topics will include the revision of various financial instruments (bonds, stocks, derivatives, among others), interest rates, money supply, inflation, monetary policy, international finance and exchange rates. We will also cover the main portfolio management concepts and will work with portfolio construction models.

The course consists of a total of 25 sessions, with 20 in-person sessions with a duration of 1hr and 20 minutes, and 5 asynchronous sessions. Asynchronous sessions will have associated studying material and an assignment that should be turned in due date.

LEARNING OBJECTIVES

- Study the importance of financial markets, financial institutions & banking, money & monetary policy and international finance & exchange rates.
- Analyze the different types of financial institutions, including banks, insurance companies, pension funds, and mutual funds.
- Study the structure and function of financial markets.
- Discuss the meaning and function of money, including as a medium of exchange, a unit of account, and store of value.
- Understand the concepts of present value, nominal rates and real interest rates.
- Define the factors that determine interest rates.
- Understand the concept of the risk structure of interest rates, and the factors that affect it.
- Analyze the different types of financial instruments available in the markets: bonds, stocks, derivatives, commodities, among others.
- Revise the main components and analysis of the financial structure of a company: equity vs debt.
- Understand the concept of securitization, and what tranching means.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	56.0 %	70.0 hours
Discussions	4.0 %	5.0 hours
Exercises in class, Asynchronous sessions, Field Work	8.0 %	10.0 hours
Group work	8.0 %	10.0 hours
Individual studying	24.0 %	30.0 hours
TOTAL	100.0 %	125.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to Banking and Financial Markets

Objectives: Provide an overview of the course and introduce students to the importance of studying financial markets, financial institutions & banking, money & monetary policy and international finance & exchange rates.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 1: Why Study Money, Banking, and Financial Markets? (See Bibliography)

SESSION 2 (LIVE IN-PERSON)

Financial Institutions

Objectives: Cover the different types of financial institutions, including banks, insurance companies, pension funds, and mutual funds. Discuss the functions of these institutions and the different types of financial instruments they offer. Analyze how these institutions gather funds from savers and lend to borrowers, as well as the risks and regulations that they face.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 12: The Investment Banking Industry (See Bibliography)

SESSION 3 (LIVE IN-PERSON)

Financial Markets

Objectives: Study the structure and function of financial markets. Types of financial markets, including capital markets, money markets, the stock market, and the bond market. Overview of the different types of financial instruments traded in each market.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 2: An Overview of the Financial System (See Bibliography)

SESSION 4 (ASYNCHRONOUS)

A first revision of Money

Objectives: Discuss the meaning and function of money, including as a medium of exchange, a unit of account, and store of value. Describe the payment system and analyze its evolution. Understand how to measure the money supply.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 3: What is Money? (See Bibliography)

SESSION 5 (LIVE IN-PERSON)

Interest Rates I (Present value and main concepts)

Objectives: Understand the concepts of present value, nominal rates and real interest rates. Define the factors that determine interest rates. Revise and understand yield to maturity, current yield, rate of return, and rate of capital gain. Understand the simple interest and compound interest formulas.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 4: The Meaning of Interest Rates (See Bibliography)

SESSION 6 (LIVE IN-PERSON)

Interest Rates II (Risk and term structure of interest rates)

Objectives: Understand the concept of the risk structure of interest rates, and the factors that affect it. Identify the term structure of interest rates and analyze the theories that explain the difference of interest rates across maturities. Convert interest rates to different time frequencies: annual, monthly or daily.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 6: The Risk and Term Structure of Interest Rates (See Bibliography)

SESSION 7 (LIVE IN-PERSON)

Financial Instruments I (Money market and introduction to bonds)

Objectives: Explore the different types of money market instruments, including treasury bills and certificates of deposit. Cover the basics of bonds, including corporate bonds and municipal bonds.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 5: The Behavior of Interest Rates (See Bibliography)

Book Chapters: "Investments" - Chapter 14: Bond Prices and Yields (See Bibliography)

SESSION 8 (LIVE IN-PERSON)

Financial Instruments II (Bonds)

Objectives: Discuss the factors that impact bond pricing and the relationship between bonds and interest rates. Understand yields, duration, pricing methodologies and default risk. Cover bond pricing methodologies.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 5: The Behavior of Interest Rates (See Bibliography)

Book Chapters: "Investments" - Chapter 14: Bond Prices and Yields (See Bibliography)

SESSION 9 (LIVE IN-PERSON)

Yield Curve

Objectives: Analyze the yield curve and its forecasting power. Understand the relationship of the slope of the yield curve and the business cycle.

Book Chapters: "Investments" - Chapter 15: The Term Structure of Interest Rates (See Bibliography)

SESSION 10 (ASYNCHRONOUS)

Financial Structure of a company: equity vs debt

Objectives: Revise the main components and analysis of the financial structure of a company. Understand valuing multiple cash flows & discounted cash flow methods (DCF). Review concepts such as: Payback period, IRR, Profitability Index.

Book Chapters: "Investments" - Chapter 19: Financial Statement Analysis (See Bibliography)

SESSION 11 (LIVE IN-PERSON)

Financial Instruments III (The stock market)

Objectives: Analyze the basics of stocks, including preferred stocks and common stocks. Discuss the factors that impact stock pricing and the relationship between stocks and the economy, including macroeconomic and industry analysis.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 7: The Stock Market, the Theory of Rational Expectations, and the Efficient Market Hypothesis (See Bibliography)
Book Chapters: "Investments" - Chapter 17: Macroeconomic and Industry Analysis (See Bibliography)

SESSION 12 (LIVE IN-PERSON)

Financial Instruments cont. III (The stock market)

Objectives: Calculate the price of common stocks using diverse methodologies such as valuation by comparables, dividend discount model, price ratios and free cash flow model.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 7: The Stock Market, the Theory of Rational Expectations, and the Efficient Market Hypothesis (See Bibliography)
Book Chapters: "Investments" - Chapter 18: Equity Valuation Models (See Bibliography)

SESSION 13 (LIVE IN-PERSON)

First Exam & International Financial markets

Objectives:Revise the financial markets, risk factors and the benefits from diversification of international markets.

Book Chapters: "The economics of money, banking and financial markets" - Chapter 18: The Foreign Exchange Market (See Bibliography)
Book Chapters: "Investments" - Chapter 25: International Diversification (See Bibliography)

SESSION 14 (ASYNCHRONOUS)

International Financial markets

Objectives: Revise the financial markets, risk factors and the benefits from diversification of international markets.

Book Chapters: "Investments" - Chapter 25: International Diversification (See Bibliography)
Book Chapters: "The economics of money, banking and financial markets" - Chapter 18: The Foreign Exchange Market (See Bibliography)

SESSION 15 (LIVE IN-PERSON)

Derivatives I

Objectives: Understand option contracts, trading and type of options. Analyze the value of options at expiration. Revise option-like securities such as callable bonds, convertible securities and warrants.

Book Chapters: "Investments" - Chapter 20: Options Markets Introduction (See Bibliography)

SESSION 16 (LIVE IN-PERSON)

Derivatives II

Objectives: What are exchange and interest rate risks? Understand key concepts and why derivatives help to manage exchange and interest rate risk.

Book Chapters: "Investments" - Chapter 20: Options Markets Introduction (See Bibliography)

SESSION 17 (LIVE IN-PERSON)

Securitization

Objectives: Understand the concept of securitization, and what tranching means.

Reading material provided in class.

SESSION 18 (LIVE IN-PERSON)

Other markets (Commodities, Real Estate, Private Equity)

Objectives: Revise other financial markets such as commodities, real estate and private equity.

Reading material provided in class.

SESSION 19 (ASYNCHRONOUS)

Sustainable Finance

Objectives: Review Green bonds, ESG investment and climate risk products.

Reading material provided in class.

SESSION 20 (LIVE IN-PERSON)

Introduction to portfolio theory

Objectives: Revise the main elements of portfolio theory, such as measuring risk and return, basic portfolio statistics (mean, variance, standard deviation, covariance and correlation), specific risk vs market risk, risky assets and the risk free rate, efficient frontier, etc.

Book Chapters: "Investments" - Chapter 5: Risk and Return, and the Historical Record (See Bibliography)

SESSION 21 (LIVE IN-PERSON)

Risk and return

Objectives: Analyze how the risk of a portfolio depends on the risk of individual stocks (standard deviation of their individual returns) and the covariance between stock returns (their correlation), and how the relationship between the portfolio risk and the expected return can be optimized through diversification.

Book Chapters: "Investments" - Chapter 6: Capital Allocation to Risky Assets & Chapter 7 (7.1, 7.2 & 7.3) Efficient Diversification (See Bibliography)

SESSION 22 (LIVE IN-PERSON)

Single Index Model and CAPM

Objectives: Review systematic factors (macroeconomic factors such as interest rates, commodity prices, etc) and firm-specific factors (technological advances, patents, strikes, etc). Understand the Single-Index model and the concept of "beta". Analyze the Capital Asset Pricing Model (CAPM) and its link to the mean-variance portfolio theory.

Book Chapters: "Investments" - Chapter 8 (8.1, 8.2 & 8.3) Index Models & Chapter 9: Capital Asset Pricing Model (See Bibliography)

SESSION 23 (LIVE IN-PERSON)

Practical examples of portfolio construction

Objectives: Portfolio construction exercise using Google Finance data and spreadsheets. Begin the construction of the covariance matrix for a stock portfolio, and therefore calculate diverse risk and return statistics for a portfolio, and be able to compare different portfolios to make investment decisions.

Reading material and files provided in class.

SESSION 24 (ASYNCHRONOUS)

Special topics (Passive vs Active Management, and Behavioral Finance)

Objectives: Compare the performance and structure of ETFs vs Investment Funds. Revise how behavioral finance differs from the efficient markets theory approach, showing how concepts such as overconfidence, mental accounting, loss aversion and anchoring can affect investment decisions.

Book Chapters: "Investments" - Chapter 11 (11.1 to 11.4): Efficient Market Hypothesis & Chapter 12 (12.1): Behavioral Finance and Technical Analysis (See Bibliography)

SESSION 25 (LIVE IN-PERSON)

Final exam

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	35 %		
Intermediate tests	20 %		
Individual work	25 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- Frederic S. Mishkin and Apostolos Serlitis. (2021). *The economics of money, banking and financial markets.* 1st edition. Pearson. ISBN 978129240948 (Printed)
- Zvi Bodie; Alex Kane; Alan J. Marcus. *Investments.* McGraw-Hill Education. ISBN 9781260571158 (Digital)

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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BASIC EXCEL FOR MANAGEMENT

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 BEFM-NBA.1C.n.OPT.M.A

Area Operations and Business Analytics
Number of sessions: 20
Academic year: 23-24
Degree course: 3º/4º
Number of credits: 4.0
Semester:
Category: OPTIONAL
Language: English

Professor: **MANOEL FERNANDO GADI ALONSO**

E-mail: mfalonso@faculty.ie.edu

ACADEMIC BACKGROUND

- Executive MBA, Business Administration and Management, IE Business School, Spain.
- Master in Computer Science and Statistics, University of Sao Paulo, Brazil.
- Computer Science Degree, University of Sao Paulo, Brazil.

CORPORATE EXPERIENCE

- Director of Credit Rating, Big Data and Business Analytics, Bravo Capital, Madrid, 2015 – Present.
- Head of R&D for Risk Analytics Area, Santander Bank Headquarters Spain, Madrid, 2012 – 2015.
- R&D Risk Analytics Area Manager, Santander Bank United Kingdom, Milton Keynes, 2008 – 2012.
- Credit Risk Modelling Manager, Santander Bank Brazil, Sao Paulo, 2007 – 2008.
- Credit Risk Supervisor, ibi bank (C&A group), Sao Paulo, 2006 – 2007.
- Credit Card Risk analyst, Citibank Brazil, Sao Paulo, 2003 – 2005.
    mfalonso@faculty.ie.edu

PREREQUISITES

For all the sessions it is mandatory to use a laptop or mac computer with Microsoft EXCEL (version for Microsoft 365 also OK).

SUBJECT DESCRIPTION

Edited by Documentation
25th August 2023

Microsoft EXCEL is a very powerful tool that allows to manage and analyze big amounts of different types of data. The results can be summarized dynamically by means of PivotTables, and presented through many kinds of charts. It has become a standard worldwide for all kind of the areas in every organization and it is regularly used by professionals and managers in most of the business processes.

EXCEL is probably the most used tool in the companies to manage, analyze and exchange data. However, many users only take advantage of a small part of its capabilities, loosing options to increase their performance.

LEARNING OBJECTIVES

The objective of this course is to provide a global view of the basic functionalities of EXCEL and practice how to apply them in business management activities. It is aimed at students with no or little experience using EXCEL.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	15.0 %	15.0 hours
Discussions	10.0 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	20.0 hours
Group work	30.0 %	30.0 hours
Individual studying	25.0 %	25.0 hours
TOTAL	100.0 %	100.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to the course and to Excel

SESSION 2 (LIVE IN-PERSON)

Introduction to Excel for Business Solutions

SESSION 3 (LIVE IN-PERSON)

Developing provisional financial statements: P&L and Balance Sheet. Solve circular references, project into the future

Practical Case : Steel & Coal Corp. (IST010028-U-ENG-WOD)

SESSION 4 (LIVE IN-PERSON)

Developing provisional financial statements: P&L and Balance Sheet. Solve circular references, project into the future

SESSION 5 (LIVE IN-PERSON)

Modeling a spreadsheet to create quotes for customers without mistakes. Protect, validate and search

Practical Case : Ross Spain, S.A. (IST010029-U-ENG-WOD)

SESSION 6 (LIVE IN-PERSON)

Modeling a spreadsheet to create quotes for customers without mistakes. Protect, validate and search

SESSION 7 (LIVE IN-PERSON)

Individual Test 1 (QUIZ FOR GRADING) content from sessions 1 to 6.

Learn how to ask for investment "with sensibility". Control your savings and ask for a mortgage

Practical Case : Loan and Mortgage (IST010125-U-ENG-WOD-BC)

SESSION 8 (LIVE IN-PERSON)

Learn how to ask for investment "with sensibility". Control your savings and ask for a mortgage

SESSION 9 (LIVE IN-PERSON)

Learn how to ask for investment "with sensibility". Control your savings and ask for a mortgage

SESSION 10 (LIVE IN-PERSON)

Learn how to ask for investment "with sensibility". Control your savings and ask for a mortgage

SESSION 11 (LIVE IN-PERSON)

Run a business based on capacity. Create the dashboard for a hotel. Accumulate and index

Practical Case : Hotel El Vallecito (IST010058-U-ENG-WOD)

SESSION 12 (LIVE IN-PERSON)

Run a business based on capacity. Create the dashboard for a hotel. Accumulate and index

SESSION 13 (LIVE IN-PERSON)

Run a business based on capacity. Create the dashboard for a hotel. Accumulate and index

SESSION 14 (LIVE IN-PERSON)

Individual Test 2 (QUIZ FOR GRADING) content from sessions 7 to 13.

Analyzing the situation of the Human Resources of a company with some basic data analysis.

Practical Case : Arnaiz Manufactures (IST010027-U-ENG-WOD)

SESSION 15 (LIVE IN-PERSON)

Analyzing the situation of the Human Resources of a company with some basic data analysis.

Practical Case : Arnaiz Manufactures (IST010027-U-ENG-WOD)

SESSION 16 (LIVE IN-PERSON)

Analyzing the situation of the Human Resources of a company with some basic data analysis.

SESSION 17 (LIVE IN-PERSON)

Analyzing the situation of the Human Resources of a company with some basic data analysis.

SESSIONS 18 - 19 (LIVE IN-PERSON)

GROUP PROJECTS PRESENTATIONS

SESSION 20 (LIVE IN-PERSON)

INDIVIDUAL FINAL EXAM - QUIZ - all course content, more questions about sessions 13 to 17.

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Individual Exam	30 %		Entire course content
Individual Tests	20 %		Average of tests
Group Project	30 %		Analysis and Presentation
Class Participation	20 %		Delivery of Excel Activities

RE-SIT / RE-TAKE POLICY

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Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

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   evaluation for the course in June / July (except those students who do not comply with the

   attendance rule, and therefore will not have that opportunity, since they will fail both calls and

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BIBLIOGRAPHY

Recommended

- John Walkenbach. *Excel 2016 Bible.* John Wiley & Sons. ISBN 9781119067510 (Printed)

- Sarah Jones. *EXCEL FUNCTIONS AND FORMULAS: Shortcuts, Formulas and Functions for Business Modeling and Financial.* Amazon Kindle. ISBN 1087119235 (Digital)

- Tim Hill. *Excel 2016 for Windows Pivot Tables.* CreateSpace. ISBN 1515010732 (Printed)

- Tim Hill. *Excel 2016 for Mac Pivot Tables.* CreateSpace. ISBN 1515114422 (Printed)

- Jeff Hutchinson. *Excel 365 - Formulas, Charts And PivotTables.* LearnLogic. ISBN 1660221943 (Printed)

- Cole Nussbaumer Knaflic. *Storytelling with Data.* John Wiley & Sons. ISBN 9781119002253 (Printed)
- Dona M. Wong. *The Wall Street Journal Guide to Information Graphics.* W.W. Norton &Co.. ISBN 9780393347289 (Printed)

BEHAVIOR RULES

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BREAKING INTO BUSINESS CASE COMPETITIONS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 BIBCC-NBA.1C.n.OPT.M.A

Area Strategy

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JOSE ANTONIO MARTINEZ MARCOS**

E-mail: jamm@faculty.ie.edu

Bachelor of Business Administration from Deusto Business School and Executive MBA from IE Business School, Jose Antonio Martinez's professional life has always been spinning around strategy. His 15-year experience in the Strategy Department of Accenture has allowed him to develop an integrated vision of the strategic roadmap at all levels of the organization, from corporate business plans to divisional/department strategies.

With major experience in top companies from a wide range of industries (telecom, high-tech, media and entertainment…), Professor Martinez has defined strategic marketing programs (launch of P/S, loyalty, channel optimization...), operational strategy and cross-company initiatives aiming at the global transformation of the corporation and the optimization of the customer experience. And as an indispensable complement in order to develop a comprehensive understanding of the strategic process, he has worked directly on the field with the customers in the implementation of most of those strategies, leading project management and change management initiatives through a hands-on and results-driven approach, managing mixed customer-consulting work teams of a very different kind.

Professor Martinez's experience throughout his consulting career has led him to a logical, but not always so evident, conclusion: "STRATEGY is not about complex theories or frameworks; it's something we all use more often than we think, in so many aspects of life, although we may not be aware of it. It's about bringing order out of chaos, it's about collecting all that mess of ideas, facts and pieces of knowledge, and providing them with a structure and sequence which let us decide WHERE WE WANT TO REACH and HOW WE WANT TO DO IT".

Having implemented coaching and training programs in top MNCs, he is currently teaching different Strategy courses in IE Business School, both in master and undergraduate programs.

jamm@faculty.ie.edu

PREREQUISITES

SUBJECT DESCRIPTION

"Case competitions... what's that???"
- Events organized by some of the most prestigious universities and business schools worldwide
- Multinational background
- Challenge: to solve a real-life based case, specifically designed for the competition, about a real company …in a highly demanding scenario (strong time constraints, deep analysis requirements…)…in direct competition with the other teams (top students from top universities)…in front of a panel composed by academic and business world members (quite often: top managers of the case company themselves!)
- Approach: consulting way!

"And what's in it for me?"
1. Competition dynamics
2. Networking
3. Development of soft skills
4. Holistic view of business
5. And... a job opportunity, maybe???

LEARNING OBJECTIVES

- Provide you with the tools and the structure to make the most out of the case competition experience…
- …and beyond the case competition!
    > *VERY IMPORTANT NOTICE: completing this course will be a mandatory prerequisite to be entitled to attend any case competition as an IE University team member, so if interested... THIS IS YOUR OPPORTUNITY!!!*

TEACHING METHODOLOGY

- Multidisciplinary approach
- Insights from all the core business disciplines (holistic view)
- Hands-on approach: contents and frameworks… in action!
- Teamwork will be king: always in teams… but not always the same teams!

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	29.33 %	22.0 hours
Discussions	21.33 %	16.0 hours

Exercises in class, Asynchronous sessions, Field Work	0.0 %	0.0 hours
Group work	49.33 %	37.0 hours
Individual studying	0.0 %	0.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSIONS 1 - 3 (LIVE IN-PERSON)

Course Introduction + Inaugural Short Case

SESSIONS 4 - 6 (LIVE IN-PERSON)

Strategy

SESSIONS 7 - 9 (LIVE IN-PERSON)

Research and Implementation Plan

SESSIONS 10 - 12 (LIVE IN-PERSON)

PowerPoint and Presentation Skills

SESSION 13 (ASYNCHRONOUS)

Final Group Presentations - Preparation

SESSIONS 14 - 15 (LIVE IN-PERSON)

Final Group Presentations

EVALUATION CRITERIA

- Your final grade in the course will be based on both individual and group work of different characteristics that will be weighted in the following way:

criteria	percentage	Learning Objectives	Comments
Group Presentation	50 %		
Individual Work	50 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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BUILDING AN ONLINE BUSINESS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 BAOB-NBA.1C.d.OPT.M.A

Area Information Systems and Technology

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **EDUARDO PEDREÑO**

E-mail: epedreno@faculty.ie.edu

Eduardo Pedreño has worked for 20 years in the fields of corporate communications, digital media, Internet and technology. He was founder of one of the pioneer digital Spanish-language publications in 1998 and has developed software tools and advanced solutions and services for Communications departments in Accesogroup for ten years, the last four as COO. He currently manages digital marketing and ecommerce efforts for companies in the fields of education and media among others. He holds degrees in Law and Business Administration as well as an MBA from IE Business School.

epedreno@faculty.ie.edu

PREREQUISITES

This is a hands-on course and **the level of effort required is high.** You don't need to have previous knowledge of digital strategy, e-commerce technology or digital marketing tools, but make sure you feel comfortable around technology tools and concepts because you will use many at a medium level.

SUBJECT DESCRIPTION

Building an Online Business is a hands-on course that takes you through the process of researching, ideating, defining, building, launching and promoting an online e-commerce business, and understand the integral part of measurement in online businesses. We will discuss multiple online business model types, but the focus of the course will be executing the creation of an online e-commerce store. Every student will get his/her own hosting space and will create his/her own store by the end of the course.

LEARNING OBJECTIVES

This is not a course for the faint of heart. You don't need previous experience on digital strategy, e-commerce or content management systems but need to be comfortable around new technology tools, because we will use many and in depth. And a lot of the work will have to be completed outside of class. The purpose of the course is to provide real experiences and put yourself in the shoes of a real digital e-commerce manager.

This is a hands-on course, aside from covering the theoretical and aspects of online business models we also experience the whole process with our own personal project.

A key objective is to understand the four pillars of operational efficiency in Digital Strategy.

- **Planning**: and all the tools involved in the planning process, workflow definition, knowledge and content management, crisis protocols, etc.
- **Research/Monitoring/Listening**: millions of sources and potentially dozens of platforms in a way that makes the information manageable and actionable and helps us find our niche market.
- **Distributing, engaging and managing relationships**: finding and putting into place the best ways to distribute the company's message looking for maximum return and automation at the same time, as well as creating long lasting relationships with influential or relevant users through conversations.
- **Analyzing** the effects of our efforts focusing on KPIs that are actionable and allow us to determine in real or near-real time if course correction is needed.

The skills developed are:

- **The students will create their own e-commerce website** and will sell real products using dropshipping, they will create real ads on Google and Facebook and create the social media presence for their online stores. Along the way we will cover all the basic elements of a digital marketing strategy definition and implementation.
- **To develop a working framework** that allows the students to translate the most strategic aspects of a Digital Strategy plan to the day to day operations in the fields of E-commerce, Research, Analytics and Social Media management, the group assignment will be an application of the framework to a real world company.
- **Gain insights into what are the right technology tools to interact with those platforms**, and how to implement the different tools in a way that fits with the company's strategy and culture and the defined target groups.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	20.0 hours
Discussions	10.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	26.67 %	40.0 hours
Group work	23.33 %	35.0 hours
Individual studying	26.67 %	40.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

INTRODUCTION TO THE ONLINE BUSINESS LANDSCAPE

Introduction to the course. We will review the objectives of the course, the schedule and deliverables. We will also discuss the online business landscape, the communication workflows and the challenges presented by the information explosion, the increasing interaction with the audience and the real time nature of all those interactions.

HANDS-ON: HOSTING SETUP EXERCISE

The students will start their project by setting up their own hosting space (provided by a partner), setting up Wordpress and Woocommerce and performing a few actions on it.

Technical note & tutorials: Digital Marketing: Social Media and Mobile Marketing (MKS020091-U-ENG-HTM)

SESSIONS 3 - 4 (LIVE IN-PERSON)

OVERVIEW & INTRODUCTION TO RESEARCH

In this sessions we will lay the groundwork for the rest of the course introducing the working framework and basic concepts of a Digital Strategy and Management, putting the user at the core of our e-commerce plan and developing a strategy to ensure success. We will also discuss all the different elements of the individual and group assignments. We will pay special attention to Research

HANDS-ON: WORDPRESS, RESEARCH, GOOGLE NONPROFIT IMMERSION PROGRAM

We will do several exercises around our website, our research process and the Google Nonprofit Immersion program (group assignment).

SESSIONS 5 - 6 (LIVE IN-PERSON)

E-COMMERCE RESEARCH

We will look at specific tools for trends research, keyword research, content research, audience research, platform research, etc.

HANDS-ON: WORDPRESS, RESEARCH EXERCISE

(Additional readings will be provided ahead of the session)

SESSIONS 7 - 8 (LIVE IN-PERSON)

POSITIONING

We will have a case discussion (only one in the course), recap elements from research and expand on new ones to define a strategy for our e-commerce store.

HANDS-ON: POSITIONING EXERCISE

We will finish the strategy definition phase of our e-commerce business.

Practical Case: AccorHotels and the Digital Transformation: Enriching Experiences through Content Strategies along the Customer Journey (HBS IN1251-PDF-ENG)

SESSIONS 9 - 10 (LIVE IN-PERSON)

INTRODUCTION TO SEO

One of the key components of an e-commerce strategy (along with Social Media and Content Marketing) is SEO. We will look at what SEO means and how it translates into technology, from technical SEO to keyword mapping or off site SEO.

HANDS-ON: INTEGRATING PRODUCTS INTO OUR WEBSITE AND SETTING UP SEO TOOLS

(Additional readings will be provided ahead of the session)

SESSIONS 11 - 12 (LIVE IN-PERSON)

Website content management and design and SEO

We will finish SEO and understand how user experience is key for SEO, mobile and ultimately conversions and sales.

HANDS ON: ON SITE SEO AND OFF SITE SEO

- Identify the keywords that would be most worthwhile for a website to target in its search engine optimization efforts.
- Improve a webpage's relevance for a target keyword by suggesting specific changes to the webpage.
- Improve a website's likelihood of ranking for a set of keywords by suggesting changes that will improve the website's quality signals to search engines.

(Additional readings will be provided ahead of the session)

Technical note: Search Engine Optimization Starter Guide (Google)

SESSIONS 13 - 14 (LIVE IN-PERSON)

SOCIAL MEDIA

- Describe the parts of a social media campaign plan and use this plan to design an effective

campaign.

- Choose the best social media platform(s) for a variety of social media efforts.
- Determine the measures needed to assess the results of a social media campaign.
- Describe best practices for performing social media marketing on Facebook, TikTok, Twitter, Pinterest, YouTube, LinkedIn, Instagram, and Snapchat.

HANDS-ON: FACEBOOK PAGE SETUP AND FINISHING E-COMMERCE WEBSITES

(Additional readings will be provided ahead of the session)

SESSIONS 15 - 16 (LIVE IN-PERSON)

SEM Search Engine Marketing

The paid search engine marketing is a complex world of keyword bidding, remarketing and countless ads, but it's also a really efficient way to get new customers. We will also use tools like SEMRush to check what our competitors are doing.

HANDS ON: GOOGLE NONPROFIT IMMERSION PROGRAM SETUP

We will setup the ad campaigns for our NGOs in the Google Nonprofit Immersion Program.

Multimedia Material: Google Ads Youtube Channel (Youtube)

Multimedia Documentation: Google Ads Academy (Skillshop)

SESSIONS 17 - 18 (LIVE IN-PERSON)

EMAIL MARKETING

- Create an effective strategy for building a commercial email list.
- Create effective content for a commercial email campaign.
- Analyze the results of an email campaign to determine its effectiveness.
- Describe best practices to prevent emails from being stopped by spam filters.

HANDS ON: EMAIL MARKETING SETUP, INTEGRATION IN THE WEBSITE, SETTING UP AND SENDING NEWSLETTERS

(Additional readings will be provided ahead of the session)

SESSIONS 19 - 20 (LIVE IN-PERSON)

Facebook Ads, setting up a CPC campaign.

Facebook is the biggest social network in the world with 1,94 billion users, that combined with Instagram's, gives us the reach of 2,64 billion users, and the campaigns are cheap and effective. On the other hand, the statistics are measured by Facebook itself, and there is a huge controversy as to whether they are pumping up the numbers.

HANDS-ON: SETTING UP OUR FACEBOOK ADS CAMPAIGN

Every student will setup their own Facebook Ads Campaign.

Article: Facebook Ads Guide (Facebook)

SESSIONS 21 - 22 (LIVE IN-PERSON)

ONLINE MEASUREMENT

With all the information from the multiple analytics sources, the final step in the whole process is developing a measurement plan that is both comprehensive, that assists in the decision making process and lends itself to optimization and iteration. We will discuss all these aspects in the final face to face session.

HANDS-ON WITH GOOGLE ANALYTICS

(Additional readings will be provided ahead of the session)

SESSIONS 23 - 24 (LIVE IN-PERSON)

TECHNOLOGY BASED GROWTH: GROWTH HACKING, CONVERSION RATE OPTIMIZATION AND A/B TESTING

The individual online business should be finished by now with the design, integration of products, content, social media, SEO and email marketing tools.

HANDS ON: IMPLEMENTING CRO IN OUR E-COMMERCE WEBSITE (AND HOW TO MEASURE IT)

(Additional readings will be provided ahead of the session)

SESSIONS 25 - 26 (LIVE IN-PERSON)

We will discuss a very specific exercise on content marketing and SEO, called content optimization. We will follow a process of creation of content, optimization through AI software to make our content competitive for search engines, and publish it on our website.

The hands-on portion of the double session will be dedicated to creating and optimizing the content.

SESSIONS 27 - 28 (LIVE IN-PERSON)

This session will be dedicated to testing some of the conversion rate optimization tools and techniques available on our websites.

The Hand-on portion of the session will be dedicated to putting those exercises into practice.

SESSIONS 29 - 30 (LIVE IN-PERSON)

Final Q&A on deliverables of the course, and...
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FINAL GROUP PRESENTATIONS

EVALUATION CRITERIA

Individual assignment will be graded valuing the criteria below:

- Execution of all the elements contemplated in the rules for the assignment (20%)
- Consistency between all the elements defined in the strategy and the execution of the assignment (20%)
- Width and breadth of the assignment: the assignment has multiple elements that are chosen freely by the student (content, platforms, web content, etc.). A perfect assignment not only is consistent with the strategy developed but also has enough content elements to test that strategy in the real world. (30%)
- Quality of ad campaigns: the online ads carried out throughout the assignment have to follow a

methodology and adequate research. We will not judge results but in SEM results are generally a measure of a well executed campaign. The same applies to Social Media ads, but in that case we will also evaluate a more creative aspect. (30%)

Group assignment will be valued on the basis of:

- Quality of the assessment to a real world company (report): the level of insight offered to the "client" (50%)
- Quality of the presentation (20%).
- Consistency between research and analysis and the subsequent strategy proposed. (30%)
- Participation is graded on a scale from 0 (lowest) through 4 (highest), using the criteria below. I expect the average level of participation to satisfy the criteria for a "3", which would correspond to 12.0 - 13.5.

  0.- Absent.

  1.- Grade 12 - 13.9: Present, not disruptive / Tries to respond when called on but does not offer much / Demonstrates very infrequent involvement in discussion.

  2.- Grade 14.0 - 15.9: Demonstrates adequate preparation: knows basic reading facts, but does not show evidence of trying to interpret or analyze them / Offers straightforward information (e.g., straight from the reading), without elaboration or very infrequently (perhaps once a class) / Does not offer to contribute to discussion, but contributes to a moderate degree when called on / Demonstrates sporadic involvement.

  3.- Grade 16.0 - 17.9: Demonstrates good preparation: knows reading facts well, has thought through implications of them / Offers interpretations and analysis of reading material (more than just facts) to class / Contributes well to discussion in an ongoing way: responds to other students' points, thinks through own points, questions others in a constructive way, offers and supports suggestions that may be counter to the majority opinion / Demonstrates consistent ongoing involvement.

  4.- Grade 18.0 - 20.0: Demonstrates excellent preparation: has analyzed readings exceptionally well, relating it to other material (e.g., other readings, course material, discussions, experiences, etc.) / Offers analysis, synthesis, and evaluation of class material, e.g., puts together pieces of the discussion to develop new approaches that take the class further / Contributes in a very significant way to ongoing discussion: keeps analysis focused, responds very thoughtfully to other students' comments, contributes to cooperative argument-building, suggests alternative ways of approaching material and helps class analyze which approaches are appropriate, etc. / Demonstrates ongoing very active involvement.

criteria	percentage	Learning Objectives	Comments
Intermediate Tests	10 %		
Intermediate milestones	10 %		
Individual Assignment	45 %		
Group Assignment	25 %		
Class Participation	10 %		

RE-SIT / RE-TAKE POLICY

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Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

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BUSINESS INTELLIGENCE AND ANALYTICS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 BIA-NBA.1C.p.OPT.M.A

Area Information Systems and Technology

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **HUONG MAY TRUONG**

E-mail: htruong@faculty.ie.edu

May Truong is a Full-time Assistant Professor in Information Systems at IE Business School. She holds a Ph.D. in Information Systems from Erasmus University Rotterdam. She obtained her Master of Science in Operational Research from the University of Edinburgh. Her research focuses on digital markets, the economic impact of information technology, and multi-channel systems. She has presented her works and won multiple awards and nominations at different prestigious Information Systems Conferences such as the International Conference on Information Systems (ICIS), the European Conference on Information Systems (ECIS), Conference on Information Systems and Technology (CIST), and Workshop on Information Technologies and Systems (WITS). Her thesis project is also the winner of the AIS Impact Award at ICIS 2020.

htruong@faculty.ie.edu

PREREQUISITES

A basic understanding of mathematics and statistics, e.g., how to calculate a mean value, what is a p-value, etc, and a basic understanding of software programming concepts, e.g., data types, data frame, variables, libraries, debugger, will be useful for this course.

SUBJECT DESCRIPTION

Edited by Documentation
25th August 2023

Business analytics is the use of information technologies for analyzing data to help managers make better decisions about their business and how they serve customers. The innovative use of business analytics technologies forms a powerful basis for competitive advantage in today's economy. The purpose of this course is to explain how data-driven business analytics technologies, such as data mining, artificial intelligence and machine learning can help in many important business applications. This course begins by covering these topics at a basic, fundamental level for those who have little or no experience with these technologies. This course builds on this foundation to provide a comprehensive exploration of a variety of data analytics techniques.

The course will be divided into 3 main blocks:

- Data mining Process, mapping business problems to machine learning problems. Data Requirements and Visualization.
- Models training and Models Evaluations.
- Other Data mining problems and techniques.

LEARNING OBJECTIVES

Understand and learn about various exploratory and predictive techniques, such as classification and regression trees, clustering, nearest neighbor approaches, association rule mining, neural networks, etc. Learn how the above business analytics techniques are applied in a variety of business applications and organizational settings. Understand the process of introducing data analytics technologies into the business environment.

All of this includes:

- Building the case for business analytics technologies.
- Collecting relevant data and visualizing different types of data.
- Learning different techniques and tools for business data analytics.
- Using R for data mining and analysis.
- Applying data analytics techniques to various business problems.

TEACHING METHODOLOGY

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Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	30.0 hours
Discussions	3.33 %	5.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	30.0 hours
Group work	26.67 %	40.0 hours
Individual studying	30.0 %	45.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Course Introduction & Introduction to Business Analytics

- Introduction to the course
- Prediction & Causality
- Data Mining Process
- Types of Machine Learning problems & applications

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 1 & 2) (See Bibliography)

SESSION 2 (LIVE IN-PERSON)

(Continue with session 1)

SESSION 3 (LIVE IN-PERSON)

Data & Data Visualization I

- Data types, data collection, and data quality
- Other data-related issues: data privacy and data bias

SESSION 4 (LIVE IN-PERSON)

Lab: Introduction to R

- Introduction to R, importing data, data cleaning, and data summary
- You should endeavor to install R & Rstudio before our first class meeting. However, if you encounter problems, this will be a good time to mention the issues you are having to me. I will use this time to also walk you through the R Studio interface.

SESSION 5 (LIVE IN-PERSON)

Data & Data Visualization II

- Common Data Visualization Tools

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 3) (See Bibliography)

SESSION 6 (LIVE IN-PERSON)

Lab: Data Visualization II

- Basic R Data Visualization

SESSION 7 (ASYNCHRONOUS)

Complete the interactive case.

Technical note & tutorials: Machine Learning (IST020075-U-ENG-HTM)

SESSION 8 (LIVE IN-PERSON)

Fitting models to data: Classification I
- Classification Tree
- Ensemble Method: Random Forest, Bagging

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 9 & 13) (See Bibliography)

SESSION 9 (LIVE IN-PERSON)

Fitting models to data: Classification II
- Linear models and K-Nearest Neighbours

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 7 and 10) (See Bibliography)

SESSION 10 (LIVE IN-PERSON)

Lab: Classification I
- Classification Tree in R

SESSION 11 (ASYNCHRONOUS)

Lab: Classification II
- Linear models and K-nearest Neighbours in R

SESSION 12 (LIVE IN-PERSON)

Fitting models to data: Numeric Prediction
- Overview of Numeric prediction
- Basic numeric prediction methods: regression, regression tree, k-NN Regression

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 6, 7 and 9) (See Bibliography)

SESSION 13 (LIVE IN-PERSON)

Lab: Numeric Prediction.
Quiz 1

SESSION 14 (LIVE IN-PERSON)

Avoid Overfitting and Model Performance Evaluation
- An overview of model fit and evaluation
- Generalization and overfit
- Holdout and Cross-Validation
- Evaluation Measurements: Accuracy, AUC, etc.

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 5) (See Bibliography)

SESSION 15 (LIVE IN-PERSON)

Continue with session 14

SESSION 16 (LIVE IN-PERSON)

Lab: Model Fit & Evaluation 1

- Apply Evaluation Methods in R

SESSION 17 (ASYNCHRONOUS)

Lab: Model Fit & Evaluation 2

- Practice different Evaluation Methods in R

SESSION 18 (LIVE IN-PERSON)

Cluster Analysis

- Clustering Methods: k-means clustering, hierarchical clustering, and their applications

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 15) (See Bibliography)

SESSION 19 (LIVE IN-PERSON)

Lab: Cluster Analysis

- Practice Clustering problems in R

SESSION 20 (LIVE IN-PERSON)

Neural Network

- An overview of Neural Network analysis and its application

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 11) (See Bibliography)

SESSION 21 (ASYNCHRONOUS)

Lab: Neural Network

- Practice Neural Network Problems in R.

SESSION 22 (LIVE IN-PERSON)

Text Mining & Natural Language Processing
Basic of Working with Textual Data and Analysis

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 20) (See Bibliography)

SESSION 23 (LIVE IN-PERSON)

Lab: Text Mining

- Practice Text Mining Problems in R

Quiz 2

SESSION 24 (LIVE IN-PERSON)

Association Rules & Recommendation Systems

   - Association Rules algorithm and its application

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 14) (See Bibliography)

SESSION 25 (ASYNCHRONOUS)

Group Project Feedback Session

SESSION 26 (LIVE IN-PERSON)

Social Network Analysis

   - Network data and representation, Social Network Analysis, and its application

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 19) (See Bibliography)

SESSION 27 (LIVE IN-PERSON)

Other advanced topics

   - Other advanced topics: Big data

SESSION 28 (ASYNCHRONOUS)

Complete the interactive case

Technical note & tutorials: Big Data (IST020061-U-ENG-HTM)

SESSION 29 (LIVE IN-PERSON)

Exam Review
We will spend the next-to-last session on exam preparation. We will go through exam formats and some practice problems.

SESSION 30 (LIVE IN-PERSON)

FINAL EXAM

The final exam will be worth 30% of your final grade.The exam will take place in the regular class location, at the regularly scheduled time for Session 30.

EVALUATION CRITERIA

The evaluation of this class includes:

criteria	percentage	Learning Objectives	Comments
Final Exam	30 %		

Intermediate Tests	20 %		2 quizzes distributed during the course
Individual Work	10 %		lab exercises completion
Workgroups	30 %		
Class Participation	10 %		Class attendance

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re- enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3 rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

! Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY
Compulsory
 - Galit Shmueli, Peter C. Bruce, Inbal Yahav, Nitin R. Patel, Kenneth C. Lichtendahl Jr. (2017). *Data mining for business analytics : concepts, techniques, and applications in R.* Wiley. ISBN 9781118879368 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct [here](). The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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BUSINESS INTELLIGENCE FOR STARTUPS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 BISS-NBA.1C.e.OPT.M.A

Area Entrepreneurship

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **BRIAN CHARLES WINANS**

E-mail: bwinans@faculty.ie.edu

Brian C. Winans graduated with departmental honors from Northwestern University, receiving a double major in Mathematical Methods in Social Sciences and Economics. He obtained his Masters in Management, specializing in Telecom and Digital Business at IE, ranked number one of all full-time students.

Brian has previously worked as a U.S. diplomat, serving in both South America and Europe. He also has experience working in various forms of consulting (management as well as R&D and innovation), most recently focusing on digital consulting. He helped create the Business Intelligence unit within a social media network, as well as was the Head of Business Intelligence at a digital marketing agency. He teaches Business Intelligence for Startups and Introduction to Programming and is final project supervisor. In addition, he is currently developing a startup project of his own.

bwinans@faculty.ie.edu

PREREQUISITES

There are no mandatory prerequisites for this class. However, an understanding and comfort of very basic mathematics is necessary for some calculations, particularly metrics. Understanding the importance of interpersonal communication skills is also important, as the work of those within business intelligence is often dependent upon many players within a company or startup. The last set of skills which is important within business intelligence is critical thinking and common sense. A one-size-fits-all approach cannot be utilized in business intelligence as the challenges and problems faced vary dramatically from one app or website to another.

SUBJECT DESCRIPTION

"Business Intelligence for Startups" provides students with an introduction to business intelligence (BI) and highlights its importance to entrepreneurs as they begin developing their unique ideas and concepts for websites and mobile applications. While the class focuses upon BI's utilization from the very initial inception of an idea within a startup, the learnings can be utilized within any organization that is looking to use numbers to help guide it in the innovation process, particularly regarding websites and mobile applications. Whether or not students have a strong interest in becoming experts in the subject, upon completion of the class, students should understand BI, the basics regarding how it is utilized, and the important role it plays within companies.

LEARNING OBJECTIVES

The main objective of the class is to highlight the role of business intelligence along all steps of a product's creation, from the birth of an idea, to the creation of a concept quantified by Key Performance Indicators (KPIs), to the selection of the correct measurement tools, to testing and analysing the data, to launching the product and reporting on and improving its performance. The class also covers such challenges as witnessing and reacting to long-term bad trends. Skills that students should have acquired by the end of the course include:

- Understanding of the most common BI metrics.
- Determining KPIs for a startup.
- Selecting the appropriate measurement tools based on a startup's needs.
- Choosing the most important events to be measured.
- Identification and creation of streamlined funnels.
- Knowledge of A/B testing.
- Understanding of common BI reports and tests.
- Recognizing the utility of gamification in a product.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	33.33 %	50.0 hours
Discussions	10.87 %	16.3 hours
Exercises in class, Asynchronous sessions, Field Work	10.8 %	16.2 hours
Group work	25.0 %	37.5 hours
Individual studying	20.0 %	30.0 hours

TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

What is BI? Why is it important? What skills do I need for BI?

Assignment to be done prior to class:

Article: The Case for Hiring MIS Graduates (Business Intelligence Journal, Vol. 19, No. 3) (CED)
Technical note: Analytics 3.0 (HBS R1312C-PDF-ENG)

SESSION 2 (LIVE IN-PERSON)

The importance of metrics. Vanity versus actionable metrics. An introduction to some common metrics, Part 1.

Assignment to be done prior to class:

Article: Why vanity metrics are so dangerous (Startup Lessons Learned)

Article: Vanity vs. Actionable Metrics: Are you tracking the right stats in your business? (Fizzle)

SESSION 3 (LIVE IN-PERSON)

Testing Your Understanding of common metrics, Part 1: In-class work on previously-discussed metrics.

Assignment to be done prior to class:

Article: The 6 Most Important Web Metrics to Track for Your Business Website (Bplans)

SESSION 4 (LIVE IN-PERSON)

An introduction to some common metrics, and Testing Your Understanding, Part 2.

Assignment to be done prior to class:

- Review all metrics introduced thus far.

SESSION 5 (LIVE IN-PERSON)

An introduction to some common metrics, and Testing Your Understanding Part 3.

Assignment to be done prior to class:

Article: Key Performance Indicators (KPI). How an organization defines and measures progress towards its goals (The Balance Careers)

SESSION 6 (LIVE IN-PERSON)

An introduction to some common metrics, Part 4.

Assignment to be done prior to class:

Article: How To Use Behavior Flow To Understand Your Users (Forbes)

SESSION 7 (LIVE IN-PERSON)

Introduction to KPIs, AARRR, and the Lean Canvas.

Assignment to be done prior to class:

Other / Complementary Documentation: Capture Your Business Model in 20 Minutes – Lean Canvas (Youtube)

Article: Product Marketing for Pirates: AARRR! (aka Startup Metrics for Internet Marketing & Product Management) (View powerpoint deck on startup metrics) (Master of 500 Hats)

SESSION 8 (LIVE IN-PERSON)

An introduction to some common metrics, Part 5.

Assignment to be done prior to class:

- Review all previously discussed metrics in preparation for class.

SESSION 9 (LIVE IN-PERSON)

Testing Your Understanding of common metrics, Part 6.

Assignment to be done prior to class:

- Review all previously discussed metrics in preparation for class.

SESSIONS 10 - 11 (LIVE IN-PERSON)

Our AARRR and Lean Canvas: Group presentations of concepts learned.

Assignment to be done prior to class:

- Prepare group presentation on AARRR and Lean Canvas.

SESSION 12 (LIVE IN-PERSON)

Events and Funnel Analysis: Introduction.

Assignment to be done prior to class:

Article: A Simple Guide to Understanding and Creating a Website Conversion Funnel (Crazy Egg)
Other / Complementary Documentation: Definition of event (Webopedia)
Article: Event Tracking. So Easy, Your Mom Could Do It (Read until section: "Okay, so let's get to it") (Ironistic.com)

SESSION 13 (LIVE IN-PERSON)

Discussion on pros and cons of creating a startup.

Assignment to be done prior to class:

- Prepare questions regarding what you would like know about creating a startup.

SESSION 14 (LIVE IN-PERSON)

Finishing Funnels...moving on to Lifetime value and Cost of acquisition.

Assignment to be done prior to class:

Article: Startup Killer: the Cost of Customer Acquisition (For Entrepreneurs)

SESSION 15 (LIVE IN-PERSON)

Lifetime value, Cost of acquisition, and Cohort analysis, continued.

Assignment to be done prior to class:

Article: Cohort Analysis – Measuring Engagement Over Time (52 Weeks of UX)

Article: 3 Rules to Actionable Metrics in a Lean Startup (teamlewis.com)

SESSIONS 16 - 17 (LIVE IN-PERSON)

Going Viral: Introduction.

Going Viral: In class exercise.

Assignment to be done prior to class:

Article: Lessons Learned – Viral Marketing (For Entrepreneurs)

Article: Your Viral Co-Efficient Sucks and That's (saasquatch.com)

SESSION 18 (LIVE IN-PERSON)

A/B Testing: Introduction.

Assignment to be done prior to class:

Article: The A/B Test: Inside the Technology That's Changing the Rules of Business (Wired)

Article: Amelia Mango: A Simple Approach to Relevant A/B Testing (Team Lewis)

SESSION 19 (LIVE IN-PERSON)

Cohort analysis, A/B Testing, and Funnel Analysis Preparations

SESSIONS 20 - 21 (LIVE IN-PERSON)

Funnels: Group presentation.

Assignment to be done prior to class:

- Prepare for group presentation on a funnel.

SESSION 22 (LIVE IN-PERSON)

Wrap-up on A/B Testing.

Assignment to be done prior to class:

- Come to class with lessons learned from presentations.

SESSION 23 (LIVE IN-PERSON)

KPIs and online measurement tools: Introduction.

Assignment to be done prior to class:

- Come to class with ideas to discuss in small groups regarding what characteristics would a
  business/startup look for when considering measurement tools.

SESSION 24 (LIVE IN-PERSON)

Gamification.

Assignment to be done prior to class:

Article: Gamification (Financial Management; Mar 2013; ABI/INFORM Global) (CED)

Article: Is Gamification Overhyped? Customer Relationship Management (18 Customer Relationship Management, February 2013) (CED)
Article: Gamification: Toward a Definition (CHI 2011, May 7–12, 2011) (CED)

SESSION 25 (LIVE IN-PERSON)

Gamification.

Assignment to be done prior to class:

- Begin thinking about how gamification can be implemented to improve a company's KPIs.

SESSION 26 (LIVE IN-PERSON)

Ultimate BI Challenge!

Assignment to be done prior to class:

- Come to class prepared to problem-solve some BI-related questions.

SESSION 27 (LIVE IN-PERSON)

BI and Engineers & Data integrity, your own, and witnessing long-term trends.

Assignment to be done prior to class:

Article: Motivating and Working with Engineers as a Business Person (Forbes)
Article: The Secret To Engineers And Non-Engineers Getting Along Is Simpler Than You Think (Fast Company)
Article: How to Work with Software Engineers (Ken Norton)

SESSION 28 (LIVE IN-PERSON)

Final Exam.

Assignment to be done prior to class:

- Prepare for final exam.

SESSIONS 29 - 30 (LIVE IN-PERSON)

Gamification Presentations or KPIs and web analytics measurement tools presentations.

Assignment to be done prior to class:

- Prepare group presentation.

EVALUATION CRITERIA

Your final grade in the course will be based on both individual and group work of different characteristics that will be weighted in the following way:

criteria	percentage	Learning Objectives	Comments
Class Participation	20 %		
Three Group Presentations	48 %		each presentation is worth 16%
In-class group exercises	10 %		

Final Exam	16 %		
Group assessment of student participation	6 %		

RE-SIT / RE-TAKE POLICY

A. CLASS PARTICIPATION

Participation should be of **quality** revealing insight, critical thinking, and common sense. It is **relevant** and truly adds value to the discussion. While all students should attempt to engage themselves in class discussions, participation that is of particular **quality** will be rewarded.

Participation will be awarded during in-class participation, online participation, and participation in asynchronous classes.

Healthy debate is always encouraged to bring unique and different perspectives to class discussions. However, **ridicule, mockery, or bullying of classmates will result in -1 participation points for the day.**

B. THREE GROUP PRESENTATIONS

Groups will give three presentations which showcase their understanding of the concepts learned in class. An **electronic copy** (PPT, PDF, ect.) of each presentation must also be sent to the professor **via email or IE blackboard before the class in which the presentation is given.** Each presentation is worth 16% of the student's grade. **While creativity is encouraged, presentations must include both VISUAL and AUDIO elements.** The approximate deadlines for the presentations are marked within the syllabus.

C. IN-CLASS GROUP EXERCISES

Throughout the class, students will break into groups to work on in-class projects and exercises. Many times these exercises will test students' knowledge based on subject matter discussed in class. While groups should be prepared to hand in and/or present their work, **points awarded will not be based on right or wrong answers**. Rather, they will be based on the level of participation and thinking put forth for each in-class assignment. Points will be awarded based on whether or not all questions are attempted and effort is made.

D. FINAL EXAM

The final exam will assess all concepts that the students' had learned in class. The specific structure of the exam will be discussed further in class.

E. GROUP ASSESSMENT OF STUDENT PARTICIPATION

To encourage an exchange of ideas amongst students, several different group assignments are given. It is important that all students within the group participate. Students will evaluate their peers' participation on the write-up and the group presentations. The peer feedback for all group assignments will be averaged and a score will be assigned. **Students will not receive their group participation score until all group projects have been completed.** This enables more anonymity and encourages honest feedback. Students may change their groups throughout the semester to ensure they are satisfied with the people with whom they work.

Regarding to the newly implemented ´liquid learning´ model, all students must still abide by the same IEU attendance policy, including those students who are connecting remotely to class sessions and not physically in the classroom because they are unable to be physically in Spain, on campus. During the sessions, students connecting remotely are required to fully connect their camera and microphone at all times, and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

- Maurya, Ash. (2012). *Running Lean: Iterate from Plan A to a Plan That Works.* 2. O'Reilly Media. ISBN 9781449305178 (Printed)
- Ries, Eric. (2017). *The Lean Startup: How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful.* RabbitGuides. ISBN 9780307887894 (Printed)

ADDTIONAL MATERIALS

- 3 Differences Between Testing Android and iOS Devices

- [How Long Does It Take to Publish Your App?](#)
- [Web Analytics vs. Mobile Analytics: What's the Difference?](#)

BEHAVIOR RULES

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BUSINESS INTELIGENCE

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 BI-NBA.1C.d.OPT.M.A

Area Information Systems and Technology

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **HUONG MAY TRUONG**

E-mail: htruong@faculty.ie.edu

May Truong is a Full-time Assistant Professor in Information Systems at IE Business School. She holds a Ph.D. in Information Systems from Erasmus University Rotterdam. She obtained her Master of Science in Operational Research from the University of Edinburgh. Her research focuses on digital markets, the economic impact of information technology, and multi-channel systems. She has presented her works and won multiple awards and nominations at different prestigious Information Systems Conferences such as the International Conference on Information Systems (ICIS), the European Conference on Information Systems (ECIS), Conference on Information Systems and Technology (CIST), and Workshop on Information Technologies and Systems (WITS). Her thesis project is also the winner of the AIS Impact Award at ICIS 2020.

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PREREQUISITES

A basic understanding of mathematics and statistics, e.g., how to calculate a mean value, what is a p-value, etc, and a basic understanding of software programming concepts, e.g., data types, data frame, variables, libraries, debugger, will be useful for this course.

SUBJECT DESCRIPTION

Business analytics is the use of information technologies for analyzing data to help managers make better decisions about their business and how they serve customers. The innovative use of business analytics technologies forms a powerful basis for competitive advantage in today's economy. The purpose of this course is to explain how data-driven business analytics technologies, such as data mining, artificial intelligence and machine learning can help in many important business applications. This course begins by covering these topics at a basic, fundamental level for those who have little or no experience with these technologies. This course builds on this foundation to provide a comprehensive exploration of a variety of data analytics techniques.

The course will be divided into 3 main blocks:

- Data mining Process, mapping business problems to machine learning problems. Data Requirements and Visualization.
- Models training and Models Evaluations.
- Other Data mining problems and techniques.

LEARNING OBJECTIVES

Understand and learn about various exploratory and predictive techniques, such as classification and regression trees, clustering, nearest neighbor approaches, association rule mining, neural networks, etc. Learn how the above business analytics techniques are applied in a variety of business applications and organizational settings. Understand the process of introducing data analytics technologies into the business environment.

All of this includes:

- Building the case for business analytics technologies.
- Collecting relevant data and visualizing different types of data.
- Learning different techniques and tools for business data analytics.
- Using R for data mining and analysis.
- Applying data analytics techniques to various business problems.

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	30.0 hours
Discussions	3.33 %	5.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	30.0 hours
Group work	26.67 %	40.0 hours
Individual studying	30.0 %	45.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Course Introduction & Introduction to Business Analytics

- Introduction to the course
- Prediction & Causality
- Data Mining Process
- Types of Machine Learning problems & some applications

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 1 & 2) (See Bibliography)

SESSION 2 (LIVE IN-PERSON)

(Continue with session 1)

SESSION 3 (LIVE IN-PERSON)

Data & Data Visualization I

- Data types, data collection, and data quality
- Other data-related issues: data privacy and data bias

SESSION 4 (LIVE IN-PERSON)

Lab: Introduction to R

- Introduction to R, importing data, data cleaning, and data summary
- You should endeavor to install R & Rstudio before our first class meeting. However, if you encounter problems, this will be a good time to mention the issues you are having to me. I will use this time to also walk you through the R Studio interface.

SESSION 5 (LIVE IN-PERSON)

Data & Data Visualization II

- Common Data Visualization Tools

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 3) (See Bibliography)

SESSION 6 (LIVE IN-PERSON)

Lab: Data Visualization II

- Basic R Data Visualization

SESSION 7 (ASYNCHRONOUS)

Complete the interactive case.

Technical note & tutorials: Machine Learning (IST020075-U-ENG-HTM)

SESSION 8 (LIVE IN-PERSON)

Fitting models to data: Classification I

- Classification Tree
- Ensemble Method: Random Forest, Bagging

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R

(Chapter 9 & 13) (See Bibliography)

SESSION 9 (LIVE IN-PERSON)

Fitting models to data: Classification II

- Linear models and K-Nearest Neighbours

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 7 and 10) (See Bibliography)

SESSION 10 (LIVE IN-PERSON)

Lab: Classification I

- Classification Tree in R

SESSION 11 (ASYNCHRONOUS)

Lab: Classification II

- Linear models and K-nearest Neighbours in R

SESSION 12 (LIVE IN-PERSON)

Fitting models to data: Numeric Prediction

- Overview of Numeric prediction
- Basic numeric prediction methods: regression, regression tree, k-NN Regression

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 6, 7 and 9) (See Bibliography)

SESSION 13 (LIVE IN-PERSON)

Lab: Numeric Prediction.
Quiz 1

SESSION 14 (LIVE IN-PERSON)

Avoid Overfitting and Model Performance Evaluation

- An overview of model fit and evaluation
- Generalization and overfit
- Holdout and Cross-Validation
- Evaluation Measurements: Accuracy, AUC, etc.

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 5) (See Bibliography)

SESSION 15 (LIVE IN-PERSON)

Continue with session 14

SESSION 16 (LIVE IN-PERSON)

Lab: Model Fit & Evaluation 1
- Apply Evaluation Methods in R

SESSION 17 (ASYNCHRONOUS)

Lab: Model Fit & Evaluation 2
- Practice different Evaluation Methods in R

SESSION 18 (LIVE IN-PERSON)

Cluster Analysis
- Clustering Methods: k-means clustering, hierarchical clustering, and their applications

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 15) (See Bibliography)

SESSION 19 (LIVE IN-PERSON)

Lab: Cluster Analysis
- Practice Clustering problems in R

SESSION 20 (LIVE IN-PERSON)

Neural Network
- An overview of Neural Network analysis and its application

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 11) (See Bibliography)

SESSION 21 (ASYNCHRONOUS)

Lab: Neural Network
- Practice Neural Network Problems in R.

SESSION 22 (LIVE IN-PERSON)

Text Mining & Natural Language Processing
Basic of Working with Textual Data and Analysis

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 20) (See Bibliography)

SESSION 23 (LIVE IN-PERSON)

Lab: Text Mining
- Practice Text Mining Problems in R
Quiz 2

SESSION 24 (LIVE IN-PERSON)

Association Rules

- Association Rules algorithm and its application

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 14) (See Bibliography)

SESSION 25 (ASYNCHRONOUS)

Group Project Feedback Session

SESSION 26 (LIVE IN-PERSON)

Social Network Analysis

- Network data and representation, Social Network Analysis, and its application

Book Chapters: Data mining for business analytics : concepts, techniques, and applications in R (Chapter 19) (See Bibliography)

SESSION 27 (LIVE IN-PERSON)

Other advanced topics

- Other advanced topics: Big data

SESSION 28 (ASYNCHRONOUS)

Complete the interactive case

Technical note & tutorials: Big Data (IST020061-U-ENG-HTM)

SESSION 29 (LIVE IN-PERSON)

Exam Review
We will spend the next-to-last session on exam preparation. We will go through exam formats and some practice problems.

SESSION 30 (LIVE IN-PERSON)

FINAL EXAM

The final exam will be worth 30% of your final grade.The exam will take place in the regular class location, at the regularly scheduled time for Session 30.

EVALUATION CRITERIA

The evaluation of this class includes:

criteria	percentage	Learning Objectives	Comments
Final Exam	30 %		
Intermediate Tests	20 %		2 quizzes distributed during the course
Individual Work	10 %		lab exercises completion
Workgroups	30 %		

Class Participation	10 %		Class attendance

RE-SIT / RE-TAKE POLICY
RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re- enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3 rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

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BIBLIOGRAPHY
Compulsory

- Galit Shmueli, Peter C. Bruce, Inbal Yahav, Nitin R. Patel, Kenneth C. Lichtendahl Jr. (2017). *Data mining for business analytics : concepts, techniques, and applications in R.* Wiley. ISBN 9781118879368 (Printed)

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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CHANGE MANAGEMENT

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 CHM-NBA.1C.n.OPT.M.A

Area Human Resources and Organisational Behaviour

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **CUSTODIA CABANAS ANSORENA**

E-mail: CCabanas@faculty.ie.edu

Professor Cabanas has taught at IE Business School since 1990, and has been a visiting research at Insead and the University of Georgetown. She regularly collaborates with leading media agents in Spain, and publishes each year the study of The State of Internal Communication in Spain. Furthermore she created the first elective on career management at IE Business School and she is responsible for designing the school's leadership skills development workshops.

She belives that learning should be experiential and participant centered and seeks to motivate, inspire and instills a sense of ownership in the students for their learning process.

Professor Cabanas has worked with international markets across Asia, Europe and the Americas in roles spanning the areas of: Program Design and Development; Change and Innovation Management; Facilitation, Coaching and Teaching; Program Management and Delivery; International Business Development; Talent Acquisition, Global Recruitment and Admissions; and Strategic Partnerships and Projects.

She holds a PhD from IE University, an MBA from IE Business School and a Law Degree from Universidad Complutense. Professor Cabanas teaches in the BBA, IMBA, EMBA and Executive programmes at IE Business School.

She is a member of the board of a multinational communication consultancy company.

She has been for more than ten years the head of the academic department of Organizational Behavior, Human Capital Management and Leadership at IE Business School and she is the academic director of the Transformation with Purpose Fellowship.

Since september 2023 she is the Associate Dean for full-time faculty at Ie University.

Edited by Documentation
21th August 2023

Professor Cabanas is a regular speaker at various international events and conferences, as well as guest lecturer, facilitator and trainer in international organizations.

cuqui.cabanas@ie.edu

PREREQUISITES

This elective course has no formal pre-requisites. However, fundamental knowledge about business will be of great help for students.

SUBJECT DESCRIPTION

What is the main challenge companies are dealing with? What is critical to succeed today? What going to boost or dump your professional career? Your ability to successfully deal with and manage CHANGE.

The objective of the course is to prepare you to effectively deal with Change and make it happen. Change starts at a personal level: You need to know yourself and reshape your thinking patterns.Then you will need to get People, Teams and Organizations on board. And finally you will need to skillfully implement the Change that has been envisioned. During the course, students will acquire an understanding of change management best practices and their role in it as leaders or participants; gain experience applying best practice in a no-risk environment; and be ready to use this knowledge and skills to support current and future change at organizations. Students will work in teams in order to develop a common language for understanding change; share individual experiences within and between teams; identify areas where group process development is required; move forward with action plans; etc. The content and practical work during the course will help students learn how to improve operational efficiencies; apply new strategies successfully; better meet organizational needs; adapt to changing market conditions faster; and stand out in an age of scarcity and increasing uncertainty.

LEARNING OBJECTIVES

See ´description´ above, and ´methodology´ below.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10.0 hours
Discussions	20.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	26.67 %	20.0 hours
Group work	26.67 %	20.0 hours
Individual studying	13.33 %	10.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to the course: content, methodology, assessment

Why is Change so relevant today?

Article: How Industries Change (HBS R0410E-PDF-ENG) (Optional)
No required reading for Session 1.

Recommended reading: "How Industries Change"

SESSION 2 (LIVE IN-PERSON)

Getting to know yourself

Myers–Briggs Personality Profiles

Technical note: Engage the heart: Appealing to the emotions facilitates change (TCC 9B03TA10 (to be published)) (Optional)
No required reading for Sessions 2.

Recommended reading: Engage the heart: Appealing to the emotions facilitates change

SESSION 3 (LIVE IN-PERSON)

Change Management in practice: Case Analysis and Discussion

The enclosed material (CASE) is REQUIRED reading. Student must read the case BEFORE class and come ready to discuss it: Satya Nadella at Microsoft: Instilling a Growth Mindset (HBS LBS128-PDF-ENG)

CASE PREPARATION QUESTIONS:

- What was Nadella's diagnosis of the problems at Microsoft?
- What actions did he take to address the problems and reposition Microsoft?
- How effective has he been? What additional changes do you expect he will face?
- How would you describe Nadella as a leader?

Practical Case: Satya Nadella at Microsoft Instilling a growth mindset (HBS LBS128-PDF-ENG)

SESSION 4 (ASYNCHRONOUS)

Change Management in practice: Case Analysis and Discussion

Article: Leading Change: Why Transformation Efforts Fail (HBS R0701J-PDF-ENG) (Optional)
The enclosed Technical Note ("Leading Change: Why Transformation Efforts Fail ") is an optional reading for this course.

SESSIONS 5 - 7 (LIVE IN-PERSON)

The case for change

Experience Change TM ONLINE SIMULATION: Introduction, Assessment (Stakeholder Mapping), Change Theory.

No required reading for Sessions 5 to 10 prior to start the SIMULATION during classtime. The professor will provide handouts.

Article: Hard Side of Change Management (HBS R0510G-PDF-ENG) (Optional)

Multimedia Material: Experience Change TM Simulation ((EXP) (Will be Provided by Professor))
Recommended reading: Hard Side of Change Management

SESSIONS 8 - 9 (LIVE IN-PERSON)

The case for change

ExperienceChangeTM ONLINE SIMULATION: Planning, Implementation.

SESSION 10 (LIVE IN-PERSON)

ExperienceChangeTM ONLINE SIMULATION: Debrief

Article: Let's Talk About Culture Change (HBS H0070M-PDF-ENG) (Optional)
Recommended reading: Let's Talk About Culture Change

SESSION 11 (ASYNCHRONOUS)

Change Management Theory
Change Management Framework & Models

SESSION 12 (LIVE IN-PERSON)

Change Management in practice: Case Analysis and Discussion

Article: Change for Change's Sake (HBS R1006D-PDF-ENG)

Practical Case: Keeping Google "Googley" (HBS 409-039-PDF-ENG)
The enclosed materials are REQUIRED reading. Students must read the case BEFORE class and come ready to discuss it.

SESSION 13 (ASYNCHRONOUS)

Change Management in practice: Case Analysis and Discussion
The Google case: class discussion

SESSIONS 14 - 15 (LIVE IN-PERSON)

Final Team Presentations

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Simulation	20 %		
Peer Evaluation	10 %		
Final Team Presentation	35 %		
Individual Class Participation	35 %		

RE-SIT / RE-TAKE POLICY

RE-SIT / RE-TAKE POLICY

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All students must abide to the attendance policy for AY 2022-23 where physical (in-person) attendance to class is compulsory for all regular Face-to-Face courses. Those students connecting remotely to on-line class sessions are required to fully connect their camera and microphone at all times and must actively participate during the sessions (using all necessary audiovisual equipment).

The Extraordinary Call Evaluation criteria will be subject to the following rules:

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In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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ATTENDANCE POLICY

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COMPETITION POLICY

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 COPO-NBA.1C.n.OPT.M.A

Area Tax Law and Economic Regulation

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **ALFONSO OIS LOURENZO**

E-mail: aois@faculty.ie.edu

Professor ALFONSO OIS LOURENZO

Competition Lawyer and Economist / Professor

Alfonso Ois has degrees in economic sciences and business administration from ICADE in 1996 as well as a law degree from the UNED in 2011. Alfonso holds a post-graduate diploma in EC competition law from the Universidad Carlos III de Madrid and has attended the V Harvard Course in Law and Economics.

Alfonso is a partner at Martínez-Echevarria working in the antitrust & regulatory area. Alfonso is specialized in antitrust law and merger control regulation having a wide experience in filings before the European Commission and the Spanish Competition Commission as well as in the infringement procedures for cartels, restrictive agreements, and abuse of dominant position. He has considerable expertise in the regulated areas such as energy and telecommunications.

Alfonso is an associate professor in the IE University.

He has worked in both London and Madrid and is fluent in Spanish, English and French.

aois@faculty.ie.edu

PREREQUISITES

None

SUBJECT DESCRIPTION

Most countries have developed legislation to govern business competition with the aim of promoting and maintaining fair competition in markets. This subject covers the fundamentals of competition law and economics with reference to European and US applicable legislation and takes into account the legal and specially the economic underlying theory.

The course is structured with a distinct international approach, benefitting from the fact that competition law is greatly harmonized throughout the European Union and similarly structured worldwide.

LEARNING OBJECTIVES

This course aims to provide students with sufficient skills to adequately analyse commercial practices and agreements taking into account the different rules that govern market competition. Students will also gain knowledge on the relevant competition aspects of corporate transactions (mergers and acquisitions) and public financing (State aid) which may have a big impact on how a given transaction is finally envisaged.

The course will cover all legal and economic aspects of competition policy and it will be mostly focused on real case studies which help the students to understand how competition policy may affect the companies' behaviour in the market. Therefore, the course will improve the students' ability to detect potential competition concerns before making business decisions and to know how to address such concerns.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

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Group work	26.67 %	20.0 hours
Individual studying	26.67 %	20.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to competition policy: Areas of competition policy. Competition Economics and you: Impact of competition policy in business decisions. Underlying theories and general concepts: Market power.

SESSION 2 (LIVE IN-PERSON)

<u>**Anticompetitive agreements**</u>: the concept of agreements, the meaning of restrictive agreements, the analysis of effects and efficiencies.

Differences between the European and the United States approach to anticompetitive agreements.

Case study to be discussed in class.

SESSION 3 (LIVE IN-PERSON)

<u>**Anticompetitive agreements**</u>: the concept of agreements, the meaning of restrictive agreements, the analysis of effects and efficiencies.

Differences between the European and the United States approach to anticompetitive agreements.

Case study to be discussed in class.

SESSION 4 (LIVE IN-PERSON)

<u>**Market definition**</u>: relevant product market and relevant geographic market. Competitive constraints: demand substitution, supply substitution and potential competition. Evidence relied on to define relevant markets.

Technical note: Commission Notice on the definition of relevant market for the purposes of
Community competition law (Official Journal of the European Communities)

SESSION 5 (LIVE IN-PERSON)

<u>**Market definition**</u>: relevant product market and relevant geographic market. Competitive constraints: demand substitution, supply substitution and potential competition. Evidence relied on to define relevant markets.

Case study to be discussed in class

SESSION 6 (ASYNCHRONOUS)

<u>**Market definition**</u>: relevant product market and relevant geographic market. Competitive constraints: demand substitution, supply substitution and potential competition. Evidence relied on to define relevant markets.

SESSION 7 (LIVE IN-PERSON)

<u>**Cartels**</u>: concept, types and problems of detection. Economic assessment. Case study to be discussed in class.

Technical note: Price fixing, bid rigging and market allocation schemes (US Department of Justice)

SESSION 8 (LIVE IN-PERSON)

Horizontal cooperation agreements: concept, actual vs. potential competition, basic rules, block and individual exemptions and underlying economic issues. Specific categories of horizontal agreements.

Case studies to be discussed in class.

Working Paper: Commission Regulation (EU) No 1218/2010 of 14 December 2010 on the application of Article (Official Journal of the European Union)

Working Paper: Guidelines on horizontal cooperation agreements (Official Journal of the European Union)

SESSION 9 (LIVE IN-PERSON)

Technical note: Commission Regulation (EU) 2022/720 of 10 May 2022 on the application of Article 101(3) of the Treaty on the Functioning of the European Union to categories of vertical agreements and concerted practices (VBER). (Official Journal of the European Union)

Technical note: Guidelines on vertical restraints (European Commission)

Vertical agreements: concept, actual vs. potential competition, basic rules, block and individual exemptions and underlying economic issues. Specific categories of vertical agreements.

Case studies to be discussed in class.

SESSION 10 (LIVE IN-PERSON)

Merger control: unilateral effects, coordinated conduct and efficiencies. Economic theories and econometric tools.

Working Paper: Guidelines on the assessment of horizontal mergers (Official Journal of the European Union)

Working Paper: Guidelines on the assessment of non-horizontal mergers (Official Journal of the European Union)

Technical note: Vertical Merger Guidelines, June 30, 2020 (U.S. Department of Justice & The Federal Trade Commission)

Technical note: Horizontal Merger Guidelines, August 19, 2010 (U.S. Department of Justice & The Federal Trade Commission)

SESSION 11 (LIVE IN-PERSON)

Merger control: case study

SESSION 12 (LIVE IN-PERSON)

Merger control: case study

SESSION 13 (LIVE IN-PERSON)

Abuse of a dominant position/Monopolisation: concept, individual and collective dominance, types of abuses and generic defences. Economic characteristics of the main abuses of a dominant position.

Working Paper: Guidance on abusive exclusionary conducts (Official Journal of the European Union)

SESSION 14 (LIVE IN-PERSON)

Claims for damages arising from infringements of competition law: Methods to quantify damages

Working Paper: Quantifying harm in actions for damages (European Comission)

SESSION 15 (LIVE IN-PERSON)

Final exam

EVALUATION CRITERIA

Final grades will be based on a combination of class participation (20%), two case studies (40%) and the final exam (40%).

The final exam will be open book, meaning that students can consult legislation and books or any notes they may have taken in class.

criteria	percentage	Learning Objectives	Comments
Final Exam	40 %		
Workgroups	40 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

RE-SIT / RE-TAKE POLICY

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BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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CORPORATE ENTREPRENEURSHIP & INNOVATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 COEIn-NBA.1C.e.OPT.M.A

Area Entrepreneurship

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **SOLEDAD LLORENTE CANCHO**

E-mail: sllorente@faculty.ie.edu

Connector, passionate about breaking limits through exponential technologies, driver of positive change. Experienced professional in Innovation, Operations and Change Management within an international environment. She has developed her knowledge working for leading organizations such as Zara, Danone and L'Oréal.

She is innovation coach helping organizations such as Visa, Boston Scientific, HP, Banco Santander, Boston Scientific ...to grow through corporate entrepreneurship.

She is mother of 4. Her motto: "To learn, share and amplify the skills, tools and technologies to make happen a better future"

- Harvard Kenedy School - Leadership Program

- Massachusetts Institute of Technology - Sloan School of Management -

  Innovation,bentrepreneurship and leadership Program.

- Executive MBA, IE Business School (Lidera for Women scholarship).

- Major in Eco-industries, Ecole Nationale Superieure des Mines, France.

- Major in Engineering, Universidad Politecnica, Madrid.

Academic Experience

- She teaches at IE University at IE Business School.

- She mentors young entrepreneurs and startup founders at Area31 and Acció innovation hubs.

- Contributor to the development of the book "Exponential Transformation: The Exo

  Sprint Playbook to Evolve Your Organization to Navigate Industry Disruption and Change the

  World for the Better"

Corporate experience

- Innovation Coach and Corporate entrepreneurship Mentor (Board and C-Level)

- New Operations at Zara.com at Inditex headquarters, Arteixo, Spain.

- Operations Director, Danone, baby food headquarters, Amsterdam, Netherlands. - SC Unit
- Manager, L'Oréal, Luxury goods factory, Madrid, Spain.
- LAF Manager, L'Oréal, luxury goods headquarters, Paris, France.
- Production Manager, L'Oréal, mass market factory, Paris, France..
- Consultant, Paris, France.
   E-mail: sllorente@faculty.ie.edu
   Whatsapp: +34666860757

PREREQUISITES

Curiosity and Growing mindset:

- Embrace New things and Challenges.
- Seek collaboration in a diverse team.
- Embrace experimentation and continuous learning.
- Welcome and seek feedback.
- Persist and learn from setbacks.
- Gert inspired by the success of others.

SUBJECT DESCRIPTION

The signs and impacts of new technology disruptions are speeding up. Disruptive technologies and innovation are changing the way we live work and relate to one another.
New studies show how 21st century crises (COVID-19, Geopolitical conflicts…) have pushed companies and institutions over the technology tipping point and transformed business, and our life, forever.

Such disruption and challenges may open numerous new opportunities around the several future scenarios in front of us. Entrepreneurs are known by their agility to react, they are currently developing new ideas and creating new goods and services to solve arising new problems.

But what happen with legacy business? How can corporations implement a process to develop new businesses, products and services inside their existing organizations and create value to generate new revenue growth through entrepreneurial thought and action?
Many companies are, today, struggling to make their corporate entrepreneurship vision a reality.

What is corporate entrepreneurship? Entrepreneurship inside of established organizations. All companies want organic growth, but few organizations have a process in place to support innovation and sustain growth over an uncertain time. In this elective course we will dive into the process to make corporate entrepreneurship possible and we will develop corporate entrepreneurship initiatives to thrive.

We will follow a Sprint approach as the most innovative companies are doing today.

LEARNING OBJECTIVES

- To get a better professional and personal awareness of the disruption impacting every industry. "Technological and corporate entrepreneurship affinity"
- To gain a new, transformative mind-set based on the winning methodology adopted by the most innovative organizations (Companies with 10x Impact). Learning from their transformative models. HOW do they operate 10 times better, faster and more cost-effectively?
- To practice this transformative model, implementing and ensuring 10 times more impactful corporate entrepreneur initiatives. "Learning by doing"

TEACHING METHODOLOGY

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Exercises in class, Asynchronous sessions, Field Work	20.0 %	30.0 hours
Group work	33.33 %	50.0 hours
Individual studying	16.67 %	25.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

- Block 0: **INTRODUCTION, AWAKE and INDUSTRY SELECTION** (S1, S2, S3, S4, S5, S6)
- Block 1: **EXPLORE** (S7, S8, **S9**, S10, S11)
- Block 2: **IDEATE** (S12, S13, **S14**)
- Block 3: **SHARE** (S15, S16, **S17**)
- Block 4: **SCALE** (S18, S19, **S20**)
- Block 5: **SHARE II** (S21, S22, **S23**, S24, S25, S26)
- Block 6: **DISRUPT and LEARN** (S27, S28, S29, S30)

DETAILED PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)
Block 0 - INTRODUCTION, AWAKE and INDUSTRY SELECTION
S1 - INTRODUCTION

You will receive an explanation of the Syllabus. We will define how we are going to work and outline the available resources:

- Scope. In this 1st Session class groups will be discussed. The class will be split into groups/teams and students will have autonomy to choose, with their group, the Industry (corporation) you are passionate about and would therefore like to focus on and positively transform.
- Each team will have a team leader to represent the group and assure weekly assignments are advancing on schedule. This role may rotate weekly.
- Each team has a dedicated virtual space set up on Drive and whatsapp. This virtual team space creates a foundation for working autonomously, productively and collaboratively per group.
- Each week, the team leader will fill a survey with his/her feedback about weekly advancement.
- Each week, the team will have a team restrospectve.

S2 – AWAKE

It is time to awake and realize how fast things are changing around you, at a pace never seen before. Exponential technologies generate abundance in everything and traditional business models based on scarcity are becoming obsolete, urging companies to evolve through corporate entrepreneurship, if they want to participate in the new upcoming world. By following this session, you will be able to better understand the past, present and future of exponential technologies and their potential for the future of humanity. You will be able to understand the difference between linear vs. exponential thinking and what your organization can do to adapt to the rapidly changing world of today.

Format: Double Session (S1-S2), with a mix of theoretical concepts and hands-on exercises to generate teamwork, discussion and learning.

THIS SESSION IS KEY FOR STUDENTS TO CHOOSE THEIR COURSE´S SCOPE AND PERSONALIZED PATH: HOW THEY ARE GOING TO LEARN AND PRACTICE (GROUP, INDUSTRY)

SESSIONS 3 - 4 (LIVE IN-PERSON)

Block 0 - INTRODUCTION, AWAKE and INDUSTRY SELECTION

S3, S4 - NEW INNOVATION METHODOLOGIES

- How many innovation methodologies do you know of?
- What about innovation tools or frames?
- How does the innovation process differ from start ups to corporations?
- How should an highly effective and agile innovation team work autonomously?

Format: Double Session (S3-S4), with a mix of theoretical concepts and hands-on exercises to generate teamwork, discussion and learning.

SESSIONS 5 - 6 (LIVE IN-PERSON)

Block 0 - INTRODUCTION, AWAKE and INDUSTRY SELECTION

S5, S6 - EXPONENTIAL POCKER

According to Moore´s Law, the performance of anything powered by information technologies double, on average, every 2 years. Technologies evolves in a n exponential way. However, our brain works in a linear way, and it can be difficult for humans to grasp exponentials. In this session we will work the key point about exponential technologies: understanding the implications they can have in any industry or organization. The result is often impossible to predict, but we might have at least the right MINDSET these implications.

In this session, each student draws 5 "cards" and reflects on how these exponential technologies can represent an opportunity/risk for your Industry and/or successful corporation.
From those 5, they choose the two that they consider most relevant, and they place the cards in the center of the group.
The team discusses the cards presented and chooses the 4 that they think will have the most impact on the industry and/or successful corporation.

Each team analysis will be presented and discussed at the end of this double Session.

Format: Double Session (S5-S6), with a mix of theoretical concepts and hands-on exercises to generate teamwork, discussion and learning.

SESSIONS 7 - 8 (LIVE IN-PERSON)

Block 1 – EXPLORE

S7, S8 - INNOVATION CHALLENGE (think like a kid)

Workshop in collaboration, innovation and creativity.

The objective of this double session is to start working together with a creative mind, to keep the team moving forward, to discuss departure challenges, and encourage communication.

At the end of S8 the teams will receive Block 1- Assignment "EXPLORE"

Format: Double Session (S7-S8), with a mix of theoretical concepts and hands-on exercises to generate teamwork, discussion and learning.

SESSION 9 (ASYNCHRONOUS)

Block 1 - "EXPLORE" Assignment DELIVERY

Each team will share with the professor the learning insights for Block 1 assignment. "**EXPLORE the world around you**":

- Learn about exponential technologies
- Find about new business models
- Find about new trends
- And they will receive feedback.

Format - Asynchronous Session.

Each team will deliver weekly assignment trough a **maximun** 10 min recording.

This recording must include:

- Weekly insights,
- Navigation through most important parts of the weekly assignment and tasks,

SESSIONS 10 - 11 (LIVE IN-PERSON)

Block 1 – EXPLORE

S10, S11 - PREMORTEM CHALLENGE (think like a kid)

Workshop in collaboration, innovation and creativity.

The objective of this double session is to start working together with a creative mind, to keep the team moving forward, to discuss departure challenges, and encourage communication.

Format: Double Session (S10-S11), with a mix of theoretical concepts and hands-on exercises to generate teamwork, discussion and learning.

SESSIONS 12 - 13 (LIVE IN-PERSON)

Block 2 – IDEATE

S12, S13 - CORPORATE ENTREPRENEURSHIP (CORE and EDGE)

Why these sessions? Before starting to define your initiatives, you need to master which kind of corporate entrepreneurship initiatives you want to create.

- What is a business model?
- What tools you can use to define a business model?
- Types of Corporate entrepreneurship initiatives:Core and Edge

At the end of S13 the teams will receive Block 2 - Assignment "IDEATE"

Format: Double Session (S12, S13), with a mix of theoretical concepts and hands-on exercises to generate teamwork, discussion and learning.

SESSION 14 (ASYNCHRONOUS)

Block 2 - "IDEATE" Assignment DELIVERY

Each team will share with the professor the learning insights for Block 2 assignment. "IDEATE"

- Define a Multiple Transformative Purpose (MTP)
- Define Problem/Solution pairs below this MTP And they will receive feedback.

Format - Asynchronous Session.

Each team will deliver weekly assignment trough a **maximun** 10 min recording. This recording must include:

- Weekly insights
- Navigation through most important parts of the weekly assignment Templates

SESSIONS 15 - 16 (LIVE IN-PERSON)

Block 3 - SHARE

S15-S16 - DESIGN THINKING CRASH COURSE

We move in this double session from learning Design Thinking to *learning by doing* Design Thinking.

Instead of talking about Design Thinking we will dive into a Design Thinking experience using Stanford Design Thinking Crash course. *"Redesigning the Gift-Giving experience"*

- *Each student must bring prototyping material. Such as: scissors, alumium foil, yarn, spaghettis, rope, pipe cleaners, tape, cardboard, colored paper, small foam balls, marker perns, candies, wrapping paper...*

At the end of S15 the teams will receive Block 3 - Assignment "Get to know your Customers" - SHARE I

Format: Double Session (S15, S16), with a mix of theoretical concepts and hands-on exercises to generate teamwork, discussion and learning.

SESSION 17 (ASYNCHRONOUS)

Block 3 - "SHARE I" Assignment DELIVERY

Each team will share with the professor the learning insights for BLOCK 3 assignment "SHARE I"

Apply Design thinking into your initiatives:

- Convert your idea into a Prototype
- Build a discussion guide
- Interact with potential customers
- Receive feedback.

Format - Asynchronous Session.

Each team will deliver weekly assignment trough a maximun 10 min recording. This recording must include:

- Weekly insights
- Navigation through most important parts of the weekly assignment and templates

SESSIONS 18 - 19 (LIVE IN-PERSON)

Block 4 - SCALE

S18, S19 - The EXO MODEL

- What is the ExO model?
- How does it help entrepreneurs?
- What challenges do innovators face when applying ExO model?

At the end of S19 the teams will receive Block 4 Assignment "Work on the exponentiality of your ideas" - SCALE

Format: Double Session (S18, S19), with a mix of theoretical concepts and a lot of practice, discussion and learning.

SESSION 20 (ASYNCHRONOUS)

Block 4 - "SCALE" Assignment DELIVERY

Each team will share with the professor the learning insights for BLOCK 4 assignment "SCALE"

- Define and or select 1 or 2 ideas
- Define your Exo Canvas
- Define your Business Model
- Identify your key questions o answer
- Receive feedback.

Each team will deliver weekly assignment trough a maximun 10 min recording. This recording must include:

- Weekly insights
- Navigation through most important parts of the weekly assignment Templates

SESSIONS 21 - 22 (LIVE IN-PERSON)

Block 5 - SHARE II

S21-S22 LEAN STARTUP and THE MUM TEST

- What is Lean Start up?
- Lean start up Methodology: Define Hypothesis,

- Run tests to validate/invalidate or refine hypothesis
- Apply the mum test principles
- Implement Learning
- Leap of faith Assumptions: CRUX

At the end of S122 the teams will receive Block 4 - Assignment "Define your experiment" - SHARE II

Format: Double Session (S21, S22), with a mix of theoretical concepts and a lot of practice, discussion and learning.

SESSION 23 (ASYNCHRONOUS)

Block 5 - DELIVERY

Each team will share with the professor the learning insights for Block 5 assignment. Define your experiment - SHARE II

- Apply feedback received
- Create your Value Proposition Canvas
- Define your experiments

Each team will deliver weekly assignment trough a maximun 10 min recording.

This recording must include:

- Weekly insights
- Navigation through most important parts of the weekly assignment Templates

SESSIONS 24 - 25 (LIVE IN-PERSON)

Block 5 - SHARE II

S24-S25 PURPOSE DRIVEN ECOSISTEMS

We are living a turning point in humanity. Increasingly, people and corporations are becoming more purpose-driven, which is transforming the world we live in.
"*The purpose of an automobile is not to consume fuel. The purpose of a company is not to make money. The purpose of a vehicle is to transport us to a place. And the purpose of a company is to achieve something, to advance a greater cause that contributes to society.*" - Simon Sinek.

Traditional companies operate under a business model based on scarcity, offering a scarce service or product, in a market that sooner or later becomes a red ocean where competition generates a margin war that ends up consuming the industry. A few years ago, a different organizational model began to emerge. Organizations connected to abundance, whose business models take advantage of this new environment. For example, energy companies and, more specifically, companies that produce solar panels, since they connect with the source of abundance of primary energy (the sun) and offer products based on this source of abundance.

Some organizations have a desire for global reach, and this is where the Exponential Organization emerges, connecting with abundance and managing it in a way that scales exponentially. For example, AirBnB, which connects with an abundance of accommodations and today is already the largest lodging chain in the world (without even owning a single hotel).

But there are organizations that have gone beyond exponential growth in a given industry. There are organizations that have understood that the concept of industry generates scarcity and that it is now obsolete Which industry does Google belong to? Which industry does Apple belong to? None, and many at the same time. These organizations have become purpose-driven ecosystems.

At the end of S25 the teams will receive Block 4 - 2nd Assignment "Define your experiment" - SHARE II

Conect with your purpose driven ecosytem (experts, startups, corporates...) and of course your customer.

Format: Double Session (S24, S25), with a mix of theoretical concepts and a lot of practice, discussion and learning.

SESSION 26 (ASYNCHRONOUS)

Block 5 - 2nd DELIVERY

Each team will share with the professor the learning insights for Block 5 assignment. Define your experiment and connect with your Purpodse driven Ecosystem - SHARE II

How? Trough a maximun 10 min recording.

This recording must include:

- Weekly insights
- Navigation through most important parts of the weekly assignment Templates

SESSIONS 27 - 28 (LIVE IN-PERSON)

Block 6 - PITCHING LIKE AN ENTREPRENEUR

The goal of this Session is to provide you with the knowledge and confidence needed to pitch your initiatives.

- What is an Elevator Pitch?
- Pitch elements
- Tips and Recommendations

At the end of S27 the teams will receive Week6 Assignment "pitch a Corporate entrepreneurship initiative"

Format: Double Session (S26, S27), with a mix of theoretical concepts and a lot of practice, discussion and learning.

SESSIONS 29 - 30 (LIVE IN-PERSON)

FINAL PRESENTATIONS

The big moment has arrived. It is time for you to present your corporate entrepreneurship initiatives. All the class together , for a 10 min pitch and dedicated feedback per team. We will close this amazing experience by celebrating and capturing your insights.

Format: Double Session (S29, S30), with teams sharing their ideas and learmnings.

EVALUATION CRITERIA

- Individual test (30%) S18
- Individual Class participation (25%). Everyone is expected to be prepared for each class and to be an active participant in class discussion. As a team member and a team leader.
    - Team leader: Who provides guidance, instruction, direction to the team for the purpose of achieving the weekly delivery and monitors the achievements of the teams members.
    - Team member: Quantitative contributions (time), Qualitative (Raising the level – final insights learnings), Team cohesion.
- Group Weekly work (20%). In every Block, the groups advance and share with the professor.
- Final presentations (25%). Final Pitch

criteria	percentage	Learning Objectives	Comments
Intermediate Tests	30 %		
Group weekly work	20 %		
Final PITCH	25 %		
Class Participation	25 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) - i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic

Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

 - Salim Ismail. *Exponential Organizations: Why new Organizations are Ten Times better, faster and cheaper than yours.* ISBN 0884320896389 (Printed)
 - Peter Diamandis. *Abundance: The future is betters than you think.* free press. ISBN 9781451616842 (Printed)
 - Eric Ries.. *The Lean startup.* Viking. ISBN 0307887898 (Printed)
 - Alex Ostewalder. *Business model generation: A handbook for visionaries, game changers..* Yves Pigneur. ISBN 9780470876411 (Printed)
 - Steve Blanck.. *The startup owner's manual: the step by step Guide for building a great company.* Wiley. ISBN 9780984999309 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

Please, check the University's Attendance Policy here. The Program Director may provide further indications.

ETHICAL POLICY

Please, check the University's Ethics Code here. The Program Director may provide further indications.

CORPORATE STRATEGY & TRANSFORMATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 CST-NBA.1C.s.OPT.M.A

Area Others

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JOSE ANTONIO MARTINEZ MARCOS**

E-mail: jamm@faculty.ie.edu

Jose Antonio Martinez's professional life has always been spinning around strategy; as a business consultant, he has helped top executives from different industries and competitive landscapes to turn their companies into high performance businesses. And throughout these years, his experience has led him to a logical, but not always so evident, conclusion: "STRATEGY is not about complex theories or frameworks; it's something we all use more often than we think, in so many aspects of life, although we may not be aware of it. It's about bringing order out of chaos, it's about collecting all that mess of ideas, facts and pieces of knowledge, and providing them with a structure and sequence which let us decide WHERE WE WANT TO REACH and HOW WE WANT TO DO IT".

Jose Antonio enjoys teaching and considers that a Master Program provides the perfect environment to open up high value discussions and exciting opportunities to share knowledge as well as create new one. "In the classroom, the discussion goes back and forth between theory and practice. The students learn from the professor and from each other, but at the same time, the professor can deduct new theories by the help of students: from their individual experiences, their reactions to the theories, and from their ideas and insights. Our job as management scholars is to understand and explain the business world, to create knowledge that improves productivity and efficiency in the business world, and spread this knowledge back to the business world".

Academic Background
Bachelor's Degree in Business Administration, University of Deusto, Spain
Executive MBA, IE Business School

Teaching and Academic Experience
Adjunct Professor of Strategy Department, IE Business School
Adjunct Professor of Strategic Management, University of Deusto
Coaching and training in leading Spanish and multinational corporations

jamm@faculty.ie.edu

PREREQUISITES

SUBJECT DESCRIPTION

During the course students will be exposed to the analysis of complex management situations that require a multidisciplinary approach from the perspective of top management.

Through the discussion of cases and related readings, the course focuses on corporate strategy analysis and how to build corporate advantage in our global economy. The main theories, models and tools within the field of strategy will be covered with a strong emphasis on its application to real settings. We will use the tools that help top management analyse the business environment, formulate strategies and make decisions at the corporate strategy level.

Our goal is to develop a winning strategy and to build a successful organization. This is a tough job. So let us begin with the most obvious fact: every organization is different. From this simple fact we can derive something quite useful for us as strategists: different firms in the same industry will have different strategies. Now let us ask why.

A key reason is that the management teams evaluate differently the competitive environment and hence decide on different strategies. Yet success does not depend solely on selecting a winning strategy: the achievement of results depends as well on the effectiveness of management. We must ask ourselves why one firm builds a strong, adaptive organization capable of creating and responding to competitive strategy, while a second firm patches together an organization that stumbles from initiative to initiative.

To sum up, the course, which develops along five main blocks, aims at helping students:

1. To root the analysis of businesses in frameworks that will ease the identification of their key features. Students should be able to determine whether a business is attractive or not.

2. To conceive business strategies that may be applied to real life business. Students should be able to justify the merits of different strategic initiatives using the same kind of arguments that a manager would use.

3. To understand the sources of corporate advantage or disadvantage of a particular business. Students should be able to propose initiatives aimed at strengthening or developing resources and capabilities.

4. To understand when collaboration initiatives with other firms for specific projects can be convenient or dangerous for a company. Students should be able to implement strategic decisions, such as mergers, acquisitions and divestitures.

LEARNING OBJECTIVES

This course focuses on corporate strategy analysis and how to build a corporate advantage. In this course we will examine the main theoretical frameworks and analytical tools that help top management to analyze, formulate strategies and make decisions at the corporate level. We will study the main decisions that define where the firm competes (e.g., diversification, vertical integration and internationalization) as well as decisions regarding the modes of entry (e.g., M&A and alliances).

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	30.0 hours
Discussions	20.0 %	30.0 hours
Exercises in class, Asynchronous sessions, Field Work	10.0 %	15.0 hours
Group work	30.0 %	45.0 hours
Individual studying	20.0 %	30.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

PART 1 - INTRODUCTION

SESSION 1 (LIVE IN-PERSON)

Introduction to Corporate Strategy

Technical note: From Competitive Advantage to Corporate Strategy (HBS 87307-PDF-ENG)

SESSION 2 (LIVE IN-PERSON)

Building a Business Model for Corporate Advantage

Technical note: Building a Business Model and Strategy: How They Work Together (HBS 5337BC-PDF-ENG)
Practical Case: Intel Corp. 2005 (HBS 706437-PDF-ENG)

PART 2 - DIVERSIFICATION

SESSION 3 (LIVE IN-PERSON)

Diversification

Technical note: Strategies of Related Diversification (HBS 705481-PDF-ENG)
Technical note: Strategies of Unrelated Diversification (HBS 705480-PDF-ENG)

SESSION 4 (LIVE IN-PERSON)

Related Diversification

Practical Case: Samsung Electronics in 2004: Conquering the Wireless Digital World (HBS SM129-PDF-ENG)

SESSION 5 (LIVE IN-PERSON)

Unrelated Diversification

Practical Case: General Electric's Corporate Strategy (HBS TB0383-PDF-ENG)

SESSION 6 (LIVE IN-PERSON)

Vertical Integration

Practical Case: Coca-Cola in 2011: In Search of a New Model (HBS 711504-PDF-ENG)

SESSION 7 (LIVE IN-PERSON)

Divestitures

Technical note & tutorials: Corporate Divestitures: A Synthesis (STR020073-U-ENG-WOD)
Practical Case: Debate Over Unbundling General Motors: The Delphi Divestiture and Other Possible Transactions (HBS 800196-PDF-ENG)

SESSION 8 (ASYNCHRONOUS)

Diversification - Group Report

SESSION 9 (LIVE IN-PERSON)

Diversification - Group Report

PART 3 - INTERNATIONAL STRATEGIES

SESSION 10 (LIVE IN-PERSON)

International Strategy

Article: Managing Differences: The Central Challenge of Global Strategy (HBS R0703C-PDF-ENG)

SESSION 11 (LIVE IN-PERSON)

Global and Multi-Domestic Strategies

Practical Case: Philips versus Matsushita: The Competitive Battle Continues (HBS 910410-PDF-

ENG)

SESSION 12 (LIVE IN-PERSON)

 AAA International Strategies

Practical Case: Walmart around the World (HBS 714431-PDF-ENG)

SESSION 13 (LIVE IN-PERSON)

 AAA International Strategies

Practical Case: McDonald's (HBS 508025-PDF-ENG)

SESSION 14 (LIVE IN-PERSON)

 International Issues for Strategy

Practical Case: Google in China (A) (HBS 510071-PDF-ENG)

SESSION 15 (ASYNCHRONOUS)

 International Strategy - Group Report

SESSION 16 (ASYNCHRONOUS)

 International Strategy - Group Report

PART 4 - EXPANSION MODES

SESSION 17 (LIVE IN-PERSON)

 Expansion Modes - The OLI Paradigm

Technical note: Eclectic Paradigm

SESSION 18 (LIVE IN-PERSON)

 Expansion Modes - The BBB Framework

SESSION 19 (LIVE IN-PERSON)

 Solving the Growth Dilemma: When To Build

Practical Case: Facebook (HBS 808128-PDF-ENG)

SESSION 20 (LIVE IN-PERSON)

 Solving the Growth Dilemma: When To Buy

Practical Case: Microsoft Acquires Activision Blizzard: Beating Sony in Gaming and the Metaverse (HBS W27700-PDF-ENG)

SESSION 21 (LIVE IN-PERSON)

Solving the Growth Dilemma: When To Buy

Practical Case: The Walt Disney Company and Pixar, Inc.: To Acquire or Not to Acquire? (HBS 709462-PDF-ENG)

PART 5 - STRATEGY IMPLEMENTATION

SESSION 22 (LIVE IN-PERSON)

Corporate Strategy Implementation

Technical note: Turning Great Strategy into Great Performance (HBS R0507E-PDF-ENG)

SESSION 23 (LIVE IN-PERSON)

Corporate Strategy and Structure

Practical Case: Procter & Gamble: Organization 2005 (A) (HBS 707519-PDF-ENG)

SESSION 24 (LIVE IN-PERSON)

Corporate Culture in Global Organizations

Practical Case: Johnson & Johnson (A) (HBS 384053-PDF-ENG)
Practical Case: Johnson & Johnson (B): Hospital Services (HBS 384054-PDF-ENG)

SESSION 25 (LIVE IN-PERSON)

Managing Coordination, Information and Knowledge

Practical Case: McKinsey & Co.: Managing Knowledge and Learning (HBS 396357-PDF-ENG)

SESSION 26 (LIVE IN-PERSON)

Implementation Plan

SESSION 27 (ASYNCHRONOUS)

Implementation Plan - Final Group Report

SESSION 28 (ASYNCHRONOUS)

Implementation Plan - Final Group Report

SESSION 29 (LIVE IN-PERSON)

Implementation Plan - Final Group Report

SESSION 30 (ASYNCHRONOUS)

Final Exam

EVALUATION CRITERIA

A. CLASS PARTICIPATION

Before each session, the students are expected to read the materials and the case assigned for the day; the readings are compulsory and they will be part of your evaluations. Participation is a critical element in this course; to participate effectively, it is necessary to have read carefully and formed a sound opinion about the main issues raised in the case and reading materials.

Three main criteria will be used in reaching judgment about your class participation:

- Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

- Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

- Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

Expect cold calling. If you are not comfortable speaking in class for personal or cultural reasons, it is your responsibility to discuss this with the professor privately at the very beginning of the course (first week of class). You should be prepared for every session.

B. GROUP ASSIGNMENTS

Each group is expected to complete a final project and present it in class and hand-in in a written form. The project will give you the opportunity to reflect on what you have learnt in class and apply it to some practical problems. More details of the project will be provided by the start of the course.

Furthermore, there will be additional group work throughout the course including a business strategy simulation and further exercises that will be part of the group assignments grade.

C. FINAL EXAM

The exam will comprise essay questions and semi-structured questions to understand your level of study, including the use of tools and frameworks taught in class, as well as your personal elaboration and critical thinking on the topics under discussion.

A minimum score of 40% (40 points) will be required in this exam in order to pass the course, regardless of performance in other assessment components.

More information on the evaluation criteria will be provided during our first session.

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		
Intermediate tests	0 %		
Individual work	0 %		
Individual presentation	0 %		

Group Assignments	30 %		
Other	0 %		
Group Presentation	0 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.).

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total

of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

 - L. Capron, W. Mitchell. *Build, Borrow, or Buy: Solving the Growth Dilemma.* Harvard Business Review Press. ISBN 1422143716 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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CREATIVE MANAGEMENT AND CONTENT STRATEGY

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 CMCS-NBA.1C.m.OPT.M.B

Area Others

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **BRIAN HALLETT**

E-mail: bhallett@faculty.ie.edu

Brian is a Photographer, Director, Visual Storyteller, and Advertising and Content Strategist. Prior to this he spent 10 years in the public and private sector before leaving the corporate world to pick up a camera and tell stories with it.

As a creative professional Brian's passion is to work with clients to create campaigns which tell their Brand Stories through unique, high-impact campaigns with authentic and powerful visual content. He brings to the table over 20 years of experience in both the public and private sector. This journey has led him to work and teach in over 40 different countries with numerous international clients.

Brian brings an international flavor to his work. Having lived in five different countries including 10 years in India and the last 18 years in Spain, his experience in the Americas, Europe and Asia as an organizational insider as well as external consultant have given him insight into Advertising and Branded Content Creation, Consumer Behavior, Brand Identity, and emerging trends in Visual and Digital Media.

Bringing to the table experience in the luxury, consumer, health care and education sectors, Brian and his team have created a strong loyalty amongst their clients, creating Advertising, Branded Content and Communications campaigns for Brands such as Cartier, Hugo Boss, Coca Cola, Pepsi, McDonald's, Max Factor, Subway, ESPN, Patek Philippe, Hyundai, Mastercard, BMW, Pantene and Max Factor, amongst many others.

Brian has over 20 years of experience as a professor, trainer, and coach. He has been an Adjunct Professor at IE University for almost 10 years teaching in the Masters in Visual & Digital Media and the International MBA Program. He has travelled to over 40 countries delivering Master Classes both in person and online to over 50,000 participants on subjects such as Storytelling, Branded Content, Brands Virality, and Curiosity & Innovation in Time of Crisis.

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PREREQUISITES

SUBJECT DESCRIPTION

This course will allow students, through practical examples, to develop advertising and content strategies for companies in the sector in which they want to work, and carry out the creative management of those strategies. Through practical experience and a review of the different decades of creativity and companies, students will be able to present their own creative strategies and manage all the creative parts of a brand strategy.

LEARNING OBJECTIVES

Our world is changing at an exponential rate. We are constantly bombarded by content, both on and offline, which seeks to grab our attention and our loyalty. The challenge that individuals, small businesses, corporations, and even governments and nonprofits face is to get our attention, engage us and move us to action.

But these days, advertising doesn't just compete with other advertising, it competes with everything online and everything else everywhere; with entertainment, information, art, etc. Whatever grabs out attention. To effectively reach our audiences, we have to reach people where they will spend the time to engage with the content we produce. The content has to be relevant, worth their time, and most importantly, it has to create value. Advertising has to achieve the goal of starting conversations, engaging, creating communities and has to be worthy of sharing. Not long ago, the main channel for advertising was television commercials. Although they continue to be useful and effective, this kind of advertising relies on a "push" model that disrupts the viewer's attention. As audiences shift to a reality in which they determine the content they will view, when and where they will view it, and whether or not to share this content with their own networks, push advertising is giving way to a "pull" methodology in which the objective is not only to get people's attention but to engage them.

From this reality sprung an entirely new genre of communication referred to as Branded Content. It has its origins in early advertising models but has really only come into its own with the shift to online digital marketing and the prevalent use of social networks for consuming, viewing and sharing content.

This course is aimed at providing students with an immersion into the world of advertising and content creation. The main objective is to develop the basic, primary skills and understanding of a creative project manager and content producer, capable of end-to-end creative management in the world of Commercial Advertising, Branded Content and Brand Storytelling.

Advertising

In spite of the changing landscape in advertising and brand communication, traditional advertising remains the predominant method of communicating with customers. Television, radio, print and outdoor advertising remain to this day the primary method of reaching potential clients in spite of the growing presence of online and digital media channels. Traditional advertising is the oldest form of brand communication and thus has been honed over hundreds of years. The advances and changes in the last century, particularly over the last 40 years, have shown a shift from typical commerce style advertising to more brand focused ads which communicate through emotions, values, and lifestyle. This tradition has allowed a blended environment where traditional advertising, combined with new advances in Branded Content, create a potent mixture of channels capable of reaching out to audiences in incredibly effective ways.

Branded Content

Different changes in several areas - market, consumer, media ecosystem, as well as sociocultural and economic ones - produced and/or accelerated by the so called Digital Revolution, have both led to a profound evolution of the marketing paradigm and leveraged consumers to an unprecedented level of empowerment, transforming the way they relate with brands. This new marketing paradigm, together with new media consumption habits, implies a new way of communicating with consumers, in which traditional tools lose both effectiveness and efficiency, ushering in new ones based on audiences' freedom to access and consume content. This new way of communicating is the essence of Branded Content, a marketing communication technique in which brands become creators, producers and distributors of content, relevant to their respective audiences, in a new model based on the pursuit of engagement, on audiences' choice of access and on a non-interruption/pull approach.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

The course uses Experiential Education Techniques that combine active learning opportunities followed by hands-on experiences and finally, extensive feedback and review processes.

Students will execute Individual Projects as well as Group Projects in which they will be responsible for the development and execution of "real-life" exercises and production of campaigns.

Through games, activities, projects, production shoots, presentations and discussions students will develop their ability to conceptualize, pitch, produce and commission commercial image-making projects. A special emphasis will be placed on verbal communication of images as well as storytelling in commercial image-making.

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	20.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	20.0 %	15.0 hours
Individual studying	20.0 %	15.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Part I:

Sessions Activities:

- Course Expectations
- Learning expectations for this course
- Course Overview
- Overview of the course, methodology and expectations

Part II:

Class Title: Advertising today: the context of the turbulent and disruptive world of push and pull

Learning Objectives:

- To understand the context of the turbulent and disruptive world of Advertising today.
- To explore the diversity of strategy and tactics in commercial advertising
- To examine a selection of images in terms of the stories they tell

Session Activities:

Lecture and discussion:

- History of Advertising
- Traditional Communications
- Branded Content
- Enter Branded Content
- The current reality of advertising, communications and branding
- The Changing Structure of the Advertising World New work paradigms, new types of teams
- The Advertising Funnel vs the Branded Content Funnel
- How does Advertising work?

- Anxiety advertising vs aspirational content
- Creating Brand Identity through Story, Look and Feel: examining both print and adfilms
- Examine images created by some of the most creative and expressive brands in the world. How do images convey Brand Personality?

Reading to prepare for this class:
Materials included in the syllabus

Book Chapters: Excerpt from Epic Content Marketing: How to Tell a Different Story, Break Through the Clutter, and Win More Customers by Marketing Less Joe Pullizi. (chapter 16) (ced)
Article: 20 Easy Tips to Build Visual Brand Identity (Canva)
Book Chapters: Landa, Robin; Advertising by Design: Generating and Designing Creative Ideas Across Media, 2016 - Chapter 1. Advertising is...(ced)

SESSIONS 3 - 4 (LIVE IN-PERSON)

Lesson: Storytelling and Dynamic Value Change

In this session we will examine the meaning of story and how it applies in the commercial world.

What is Storytelling in a commercial world?
Why do human beings tell stories?
What is the hero's journey and what role does it have in Brand Storytelling?
Dynamic Value Change
Why do so many attempts at telling Brand stories fail?
What makes a story compelling?
Why are narratives less effective than real stories in capturing audiences attention? - How can you develop an authentic story?
Students will conduct an exercise in which they have to match the storytelling Dynamic Value Change with a series of Branded Content pieces.

Students will examine and discuss the following:

What is the story of the Brand?
What is the dynamic value change?
Create a Branded Content Storytelling campaign which will drive ENGAGEMENT for the Brand
Identify the target audience
Identify the story you will tell
How will the content drive engagement?
What channels would you use?
Materials included in the syllabus
Materials included in the syllabus
Assignment details and specific reading assignments will be delivered during the class period.

SESSIONS 5 - 6 (LIVE IN-PERSON)

THE LANGUAGE OF IMAGES CREATING STILL AND MOVING IMAGES THAT TELL STORIES

This session focuses on the visual techniques as well as standards elements of design that go into forming images. We will also see how we can select and combine different techniques together to create unique styles and how these styles in turn create a visual story.

LEARNING OBJECTIVES:

To understand the visual elements used in image-making
To discover how visual language lends to storytelling
To examine how combining elements and techniques creates voice and style

ACTIVITIES:

Presentation and Class Discussion of concepts:

What is storytelling?
Why do you humans tell stories?
Developing intentions to use image-making to investigate the world, interpret subject matter and formulate concepts
Understanding the Language of Image-making as applied to advertising
Creating Brand style and voice

SESSIONS 7 - 8 (LIVE IN-PERSON)

Class title: The Creative Pitch

Learning Objectives:

To discover the purpose of the Creative Pitch and what makes them a such a powerful tool
To demonstrate the ability to create a complete Creative Pitch from end to end, with all of its components
To understand the role of Brand Storytelling in advertising and the image-making concepts
To prepare a brief Brand Personality Analysis for the client
To identify and analyze the brand personality traits, brand history and other aspects
Sessions Activities:

Lecture and discussion:

The Creative Pitch
Purpose of the Creative Pitch
What is meant by a "the Deck"?
Research and its role in Advertising Strategy.
Creating a powerful and effective Pitch
Brand Positioning, Brand Personality, and Brand Archetypes in Campaign Design
Examining sample Brand Personality Architecture and Brand Personality Statements
Formulas for Writing a Brand Personality Statement/Brand Architecture
Element of the Creative Pitch:
Developing the Strategy
Identifying Tactics
Brand Archetypes
Brand Positioning Statement
Dissecting Brand Personality
Brand Archetypes & Color Archetypes
Methodologies for understanding Brands in order to develop Creative Concepts
The Mood Board
Concept Creation
The Mind-map

Materials in preparation for this class:
Materials included in the syllabus

Multimedia Material: Video : View the following video: The Biggest Obstacles to Pitching Creative Work (Google Drive)

Article: Brand Circle: Getting Your Brand Just Right (Creative Business Blog, September 2, 2010)

SESSIONS 9 - 10 (LIVE IN-PERSON)

Class title: Developing and Presenting the Creative Pitch

Learning Objectives:

To experience the presentation of a Creative Pitch which wins clients and projects

Activities:

Students groups present their Creative Pitches for an Advertising Campaign
The professor and the other students will provide questions and feedback on the Creative Pitch presentation and deck

SESSION 11 (LIVE IN-PERSON)

Lesson: The Branded Content Funnel and the Customer Journey

Online Activity: The Customer Journey through the Branded Content World

Customer Journey: Understanding the relationship between the Customer Journey and the potential tactics used at each successive point

SESSION 12 (LIVE IN-PERSON)

Lesson: What Makes Brands Go Viral

What makes online Branded Content Campaigns go Viral?
What do all viral campaigns have in common and what elements make them unique?
What is the structure of virality with respect to traditional forms of dissemination?
The best examples of viral Branded Content out there
What role does social influence have in shaping the choices we make?
What kinds of content do we simply view, vs the content that we like or share?
What does the future hold for online viral content?
Emotional Triggers and Social Currency

Examples

Activity: students will create a viral campaign concept based upon the learnings in class.

Materials included in the syllabus

Book Chapters: Excerpts from Berger, J: Contagious: Why Things Catch on

SESSIONS 13 - 14 (LIVE IN-PERSON)

Lesson: Brand Ambassador Creative Pitch

Activity: Students will present their Creative Pitches in class and receive feedback from their peers and the professor.

SESSION 15 (LIVE IN-PERSON)

CLASS TITLE: PRESENTATION OF FINAL PROJECTS

LEARNING OBJECTIVES:

Sharing and feedback on final group projects

1.   Review of final projects
2.   What have we learned?

EVALUATION CRITERIA

ORIGINAL MATERIAL: Unless otherwise stated by the professor, all material produced for this class by the students must be original material and must be produced for this class and during the period of this class. Any material that is submitted from previous work, whether it was made by the students or by others, will be considered "non-original" work and may result in the student receiving a "0" on the assignment and/or an incomplete or failing grade in the class.

MILESTONES

EVALUATION OF INDIVIDUAL PARTICIPATION AND ATTENDANCE:

Attendance will be graded according to the sign-in sheets provided at the beginning of each session.
An absence will be counted as a "zero" for that particular class. Consideration for the reasons for the absence will be taken into account on a case by case basis. An "excused absence" will only be granted under special circumstances and supporting documentation may be required. Right of refusal for the excuse of an absence is at the sole discretion of the professor.

Online forums and discussion groups will take place and participation in these forums will also count towards the participation grade.

BRAND AMBASSADOR CREATIVE PITCH: Using the techniques discussed around the Creative Pitch and the Creative Pitch process, students will present a pitch to develop a brand ambassador program for a particular brand.

BRAND AMBASSADOR PROJECT: During a one week period students will participate in a live and in real time online activity in which they will represent a Brand Ambassador Program as if they were Ambassadors of the Brand. They will be responsable for all of the content creation and posts including the use of self-produced videos, photos, GIFs, infographics and other audiovisual materials.

ADVERTISING CREATIVE PITCH: Student groups will present a Branded Content Creative pitch for a video based branded content series.

ADVERTISING FINAL PROJECTS: Students will execute the video based project proposed in their Creative Pitches and then present those projects to the entire class.

INDIVIDUAL PROJECTS

Throughout the course, Individual Projects will be assigned which permit the students to develop their skills and aptitudes in brand analysis, branded content campaign creation, and production of photography, video and other content. Students will be required to execute projects and turn in the final work for review. The Individual Projects will be progressively more challenging and require students to understand and execute turnkey audiovisual projetcs which require students to create original and unique campaigns, utilize a variety of different types of composition, lighting styles, understand different types of lighting, conceive, as well as to shoot and edit video in a creative way that tells a story.

Students will be required to execute the projects in a timely manner. Please keep in mind that many exercises require the use of professional or semi-professional equipment including lighting and camera gear. Those students who do not possess their own equipment may coordinate with the IE Media Lab to reserve and check out equipment as per the assignments. Failure to acquire the necessary equipment will not be considered as an excuse not to complete the assignment. In many cases, students check out equipment in groups even for the individual assignments and then share the equipment amongst themselves.

GROUP PROJECTS:

Throughout the course, Group Projects will be assigned which require students to work in a group to conceptualize, produce and execute projects. Group projects, unlike Individual Projects, permit students to collaborate and learn from each other, increasing the overall level of all the students.

The same rules regarding reserving and checking out equipment apply to Individual Projects as well as Group Projects.

criteria	percentage	Learning Objectives	Comments

Branded Content Creative Pitch	15 %		
Branded Content Project	30 %		
Advertising Pitch	15 %		
Advertising Project	25 %		
Class Participation	15 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

BEHAVIOUR IN CLASS:

1. Be on time: Students arriving after roll call has been taken will be marked as "Absent".

Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor).

2. Do not leave the room during the session. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Students who need to use the restroom may do so during the break, not in the middle of the class session. Exceptions will be made for students with special needs. Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

3. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class.

If a student is disrupting the flow of the session, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

4. Use of laptops, cellphones, tablets and other technology is strictly prohibited except when it is for course-related purposes. The use of laptops during the sessions must be authorized by the professor. The use of Social Media or accessing any type of content not related to the session is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

ATTENDANCE POLICY

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ETHICAL POLICY

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CUSTOMER CENTRICITY FOR GROWTH

**Grado en Administración de Empresas / Bachelor in
Business Administration BBA SEP-2023 CCG-
NBA.1C.p.OPT.M.A**

Area Marketing and Communication

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **CELIA VELÁZQUEZ SANTIAGO**

E-mail: cvelazquez@faculty.ie.edu

Consumer insights professional unlocking the power of insights and data to help companies understand their customers and influence their strategies accordingly at a Global level.

Working in the Market Research and Insights industry since 2014.

Proffesional Experience:

- From 2014: Working at Europanel, one of the leading market research agencies globally. JointVenture between GFK and Kantar, part of the WPP group.
- From 2018: Consumer Insights Director in the Business Intelligence and Knowledge & Insights division of the Coca Cola Global Account, acting on market and competitive data to extract key trends and identify emerging business opportunities or risks to support sales growth, customer retention and asset productivity. Working with brands such as Coca-Cola, Fanta, Sprite, Innocent, Monster, Costa Coffee, Vitamin Water...
- From 2014: Worked for the Unilever Global account, in the Personal Care division building category & brand awareness for Dove, Axe, Rexona, Sunsilk... to identify key influencers to market performance. Worked in the Refreshments division with brands such as Ben&Jerrys, Magnum, Wall´s...

Educational Background:

- 2012-2013: Masters in International Management at IE Business School, with a specialization in International Business
- 2009-2012: Bachelor's degree in Market Analysis and Research at San Pablo CEU University.
- 2006-2009: Bachelor's degree in Business Studies at San Pablo CEU University.
    cvelazquez@faculty.ie.edu

PREREQUISITES

SUBJECT DESCRIPTION

Customer centricity is a strategy to fundamentally align a company´s products and services with the wants and needs of its most valuable consumers. That strategy has a specific aim: more profits for the long term. This course will give students a clear and concise understanding of what customer centricity is and isn't; to help understand why a customer-centric outlook might prove crucial to the bottom-line success in today´s fast and competitive environment.

LEARNING OBJECTIVES

- Develop a customer-centric strategy for an organization

- Understand the right way to think about customer lifetime value (CLV)

- Make informed investments in sales, marketing and customer service

- Fine tune investments in customer acquisition, retention, and development tactics based on customer heterogeneity

- Foster a culture that sustains customer centricity, and also understand the link between CLV and market valuation

- Understand customer relationship management (CRM) systems, as they are a vital underpinning for all these areas through the valuable insights they provide

- Learn about increasing the net value exchanged at customer interactions

- Approaches to customer segmentation, classification and profiling

- Understand how healthy is your customer base and how realistic are growth objectives

- Identify what is important to your high-value customers and which products help you acquire and retain your best customers

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	30.0 hours
Discussions	13.33 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	13.33 %	20.0 hours
Group work	20.0 %	30.0 hours

Individual studying	33.33 %	50.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Product Centricity
- Introduction to the course
- What is product centricity?
- Why are there cracks in the foundation of product centricity?

SESSION 2 (LIVE IN-PERSON)

Customer Centricity
- What is customer centricity?
- What are the challenges associated with customer centricity?
- What about your other customers?

SESSION 3 (LIVE IN-PERSON)

The Value of Customer Centricity
- The concept of value
- Business expectations and performance metrics
- Revenue generation, decreasing costs, reducing risks and improving productivity
- Enhancing the customer experience

SESSION 4 (LIVE IN-PERSON)

What and Who is a Customer?
- Defining the concept of customer
- Different definitions for different purposes
- How many customers do you have?

SESSION 5 (LIVE IN-PERSON)

How Different are you Customers?
- Behavior of the pool of customers that lies behind the numbers
- What changed since last period?
- Drilling Drown into Same-Customer Performance

SESSION 6 (LIVE IN-PERSON)

Patterns of Customer Behavior
- Qualitative research

- Quantitative research
- Tracking Buyer Behavior
- Influencing Customer Behavior

SESSION 7 (LIVE IN-PERSON)

How does Customer Behavior Evolve?
- Exploring the underlying patterns
- Understanding the evolution of purchase incidence

SESSION 8 (LIVE IN-PERSON)

Customer Profiling
- What is customer profiling?
- Profiling and Personas
- Using customer profiles
- Improving marketing effectiveness

SESSION 9 (LIVE IN-PERSON)

Customer Data Analytics
- Customer segmentation and classification
- Analysis techniques and methods
- Market basket analysis
- Link Analysis
- Decision tress

SESSION 10 (LIVE IN-PERSON)

Customer Lifetime Value
- What is Customer Lifetime Value (CLV)
- What can CLV do for your company?

SESSION 11 (LIVE IN-PERSON)

Maximize Customer Value
- The importance of CLV
- CLV mistakes

SESSION 12 (LIVE IN-PERSON)

Customer Acquisition and Growing Your Best Customer Base
- Understanding customer goodness and celebrating customer diversity
- Fishing for the best customers
- Strategies and tactics to acquire new customers
- Why you should be wary of demographics and personas

SESSION 13 (LIVE IN-PERSON)

Using Customer Centricity to Tune Retention and Development Tactics

- How firms develop their customers
- Retention and development

SESSION 14 (LIVE IN-PERSON)

CRM: The First Step Towards Customer Centricity

- How does customer relationship management serve customer centricity?
- What is CRM and what should it actually do?
- Why is CRM just the first step towards success in customer centricity?

SESSION 15 (LIVE IN-PERSON)

CRM's Place in Creating a Value-Based Strategy

- Integrating CLV into CRM
- CRM across companies
- Developing your CRM to support a customer-centric strategy

SESSION 16 (LIVE IN-PERSON)

How Healthy is Our Customer Base?

- Understanding the evolution of annual performance
- Customer Acquisition, Retention and Development

SESSION 17 (LIVE IN-PERSON)

Bringing Back the Product Dimension

- Understanding Customer Differences in one period
- Exploring category performance given customer visibility
- Understanding customer differences in product purchasing over time
- Exploring category purchasing and VTD

SESSION 18 (LIVE IN-PERSON)

From Audit to Action

- How to go from Audit to action
- Customer centric planning
- Introduction to simulator

SESSIONS 19 - 22 (LIVE IN-PERSON)

SIMULATOR

A highly interactive experience that teaches participants how to make data-driven decisions to maximize customer lifetime value. Participants play the role of a CMO tasked with making real-world tactical and strategic decisions about customer acquisition, retention, and development. Their key objective is to increase corporate market valuation by maximizing customer value. Participants will work on teams of 4-6 people

Multimedia Material: Customer Centricity Simulation (2023, The Wharton School, The University of Pennsylvania.)

SESSIONS 23 - 24 (LIVE IN-PERSON)

SIMULATOR debrief (1)

All the groups to share learnings, challenges and feedback from the simulator´s experience

SESSION 25 (LIVE IN-PERSON)

Customer Touch Points and The Exchange of Value

- Understanding customer interations

- Types of customer touch points

- The conceptual exchange of value

- Mapping the customer´s journey

SESSION 26 (LIVE IN-PERSON)

Organizing Data for Customer Centricity

- The need for data organization

- Organizing entity and identity data

- Managing data

SESSION 27 (LIVE IN-PERSON)

Making Customer Centricity Pervasive in The Company

- Incentivize good behaviour through recognition and reward

- Align operational and organizational interfaces

- Developing the program plan

SESSION 28 (LIVE IN-PERSON)

The Role of Customer Centricity in Corporate Valuation

- Methods of firm valuation

- The BE versus CE debate

- Recognizing when the growth phase is behind you

SESSION 29 (LIVE IN-PERSON)

Agile Change Management and Customer Centricity

- Adapting the agile methodology for customer centricity

- The Los Angeles Dodgers Case: A home run for customer centricity

SESSION 30 (LIVE IN-PERSON)

FINAL EXAM – F2F

Written examination. Multiple choice questions

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		Written examination. Multiple choice questions
Simulator	40 %		The simulator offers the ability to deeply analyze various performance metrics in order to inform future strategic decisions, and invariably proves to be a determining factor in their success (or failure)
Class Participation	10 %		It is important to be participative and proactive frequently during classes. Attendance is mandatory and it won´t contribute to the final grade

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a retaker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

 - Peter Fader. *Customer Centricity: Focus on the Right Customers for Strategic Advantage.* ISBN 9781613631027 (Digital)

 - Peter Fader and Sarah Toms. *The Customer Centricity Playbook.* ISBN 9781613630907 (Digital)

 - David Loshin Abie Reifer. *Using Information to Develop a Culture of Customer Centricity.* ISBN 9780124105430 (Digital)

 - Bruce Hardie, Michael Ross, Peter Fader. *The Customer-Base Audit.* ISBN 9781613631607 (Digital)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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CUSTOMER EXPERIENCE AND INNOVATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 CEI-NBA.1C.m.OPT.M.A

Area Others

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **SANDRA PINA AMENOS**

E-mail: spina@faculty.ie.edu

Sandra Pina has a wide experience as an innovation& marketing specialist, and also as a sustainability expert.

At Kelloggs Spain, she managed 60% of the Spanish total business, managing all adult and familiar Kelloggs brands -like Special K, Cornflakes or All Bran-, developing revolutionary marketing campaigns as "Special K 15 days plans" or "Momento All-Bran". Also she leaded not only the launch of a wide & successful innovative range of products in Spain -as per SK bars-, but she also developed the innovation of Continental Europe for Snacks and All-Bran.

She was also Marketing and Sales Director for Prisa Innova, the largest Spanish media group, developing the innovation to be launched within the different European newspapers.

Additionally, Sandra worked in London for the Danone Group, managing one of the most recognized English brands around the world: Lea & Perrins Worcestershire Sauce. Additionally based in Barcelona, at Danone yoghurts business, she was responsible for the innovation of Health products area, amongst other duties.

Sandra is now the General Manager of Quiero, a pioneer platform in Spain at the equation of business and sustainability. Quiero ?s purpose is to generate positive impact. Quiero does that through projects that bring together companies &brands, administration, NGO ?s and Foundations that seek to transform themselves and also through projects that Quiero creates, leads and finances like Sustainable Brands (SB) Madrid. SB is the global leading platform in the equation of sustainability, brands and businesses. Sandra has clients like Coke, Heineken, Unicef, Danone, Samsung, Red Cross, etc.

Sandra is part of the Global Advisory Board of Sustainable Brands, the leading global platform of brands&sustainability.

Sandra is Associated Professor for the IE Business School, apart from developing programs of Marketing, Innovation & sustainability for various multinationals and institutions. She is a usual speaker in many innovation and business forums, like BNEW Barcelona or Club of Rome.

Sandra is Lic&MBA by ESADE. She did also the superior program of Communication and Management from IE or the Building of Talent Program of Lausanne, amongst many other.

Sandra is married and has two children.

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PREREQUISITES

n/a

SUBJECT DESCRIPTION

Nowadays it is key not only to give a good customer service, but to provide with the best customer experience, ensuring the customer is at the centre. Customer experience is clearly linked to competitive advantadge and innovation, which allows companies to reinforce customer loyalty and transform clients in real ambassadors. To make this happen, the company needs to satisfy properly the expectations of their target ensuring that interactions are transformed in differential moments and attributes to its products/services/innovation.

At the same time, The leading firms are known by having innovation built into their DNA. Thus, the innovation is listed as a necessary strategy to grow according to most of the annual reports of Fortune 100 companies. However, the term Innovation is often used incorrectly and few companies are able to carry out successful innovation and success rate is extremely low.

LEARNING OBJECTIVES

- Vision the strategic role of Customer experience and Innovation in the company
- Give the necessary tools to analyze the existing relation model with the customers
- Design new relational models with clients that deliver positive and successful customer experiences
- Get to know emotional marketing tools
- Being able to apply the planning and execution process of Product Innovation in the company
- Understand and being able to adequately integrate the role that creativity plays in innovation processes in the company

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	30.0 hours
Discussions	13.33 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	4.0 %	6.0 hours
Group work	36.0 %	54.0 hours
Individual studying	26.67 %	40.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Customer experience: core of the business strategy. (1st part)

SESSION 2 (LIVE IN-PERSON)

Customer experience: core of the business strategy. (2nd part)

Article: Marketing Reading: Creating Customer Value (HBS 8176-PDF-ENG)

SESSION 3 (LIVE IN-PERSON)

Client knowledge as the base for experience design. Insights. (1st part)

SESSION 4 (LIVE IN-PERSON)

Client knowledge as the base for experience design. Insights. (2nd part)

SESSION 5 (LIVE IN-PERSON)

Innovative design of the experience. Design of the Customer Journey Map.

SESSION 6 (LIVE IN-PERSON)

Emotional and sensory experience. Role of technology.

SESSION 7 (LIVE IN-PERSON)

PRACTICAL CASE IN GROUP: PEPPERFRY

Practical Case: Pepperfry.com: Marketing to Manage Customer Experience (HBS W17332-PDF-

ENG)

SESSION 8 (LIVE IN-PERSON)

Consumer thoughts within the service/product experience. Storytelling. Branded content.(1st part)

SESSION 9 (LIVE IN-PERSON)

Consumer thoughts within the product/service experience. Storytelling. Branded content. (2nd part)

SESSION 10 (LIVE IN-PERSON)

Activation and Participative experiences.

SESSION 11 (LIVE IN-PERSON)

Employees as experience generators.

SESSION 12 (LIVE IN-PERSON)

Measuring client experience

SESSION 13 (LIVE IN-PERSON)

PRACTICAL CASE IN GROUP: UBER

Practical Case: Uber:Applying Machine Learning to Improve the Customer Experience (HBS KE1161-PDF-ENG)

SESSION 14 (LIVE IN-PERSON)

INDIVIDUAL EXAM 1: CUSTOMER EXPERIENCE

SESSION 15 (LIVE IN-PERSON)

Innovation meaning & importance. Connection to Customer Experience.

SESSION 16 (ASYNCHRONOUS)

Innovation meaning and importance. Innovation type.

SESSION 17 (LIVE IN-PERSON)

Strategic Innovation Dimensions.

SESSION 18 (LIVE IN-PERSON)

Innovation product process and Creativity integration.

Technical note: New Product Commercialization: Common Mistakes (HBS 594127-PDF-ENG)
*Publish before Class

SESSION 19 (LIVE IN-PERSON)

IDEO PRACTICAL CASE study in group: Product innovation process
Practical Case: IDEO Product Development (HBS 600143-PDF-ENG)

SESSION 20 (LIVE IN-PERSON)

Creativity & Concept Development

SESSION 21 (LIVE IN-PERSON)

PRACTICAL CASE IN GROUP: P&G Japan, The SK-II Globalization Project
Development of product innovation.
Practical Case: P&G Japan: The SK-II Globalization Project (HBS 303003-PDF-ENG)

SESSION 22 (LIVE IN-PERSON)

Launch & post-launch of product innovation

SESSION 23 (ASYNCHRONOUS)

Service Innovation.Business Model Innovation

SESSION 24 (LIVE IN-PERSON)

Organizational culture: key to innovation and change management. (1st part)

SESSION 25 (LIVE IN-PERSON)

INDIVIDUAL EXAM 2: INNOVATION

SESSION 26 (ASYNCHRONOUS)

Organizational culture: key to innovation and change management. (2nd part)

SESSION 27 (LIVE IN-PERSON)

What´s coming in Innovation. (1st part).

SESSION 28 (LIVE IN-PERSON)

What´s coming in innovation. (2nd part). Moonshot thinking

SESSIONS 29 - 30 (LIVE IN-PERSON)

PRESENTATIONS OF GROUP FINAL WORK

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Exam 1 customer experience	18 %		
Exam 2 innovation	18 %		
Cases Group Work during the course	28 %		
Final innovation Group Project & Presentation	20 %		
Individual Class Participation	16 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

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- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)
- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.
- Re-takers: Students who failed the subject on a previous Academic Year and are now re- enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

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Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

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BEHAVIOR RULES

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ATTENDANCE POLICY

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12th July 2023

CUSTOMER INSIGHTS AND BEHAVIOR

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 CUB-NBA.1C.m.OPT.M.A

Area Others

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MARTA MARTÍN MORENO**

E-mail: mmartinm@faculty.ie.edu

Professor Martin Moreno has over 20 years of international experience in marketing, with emphasis on product development, communications, retail, consumer behavior and loyalty. Marta has held management positions at KIMBERLY-CLARK (US and London), TUPPERWARE EUROPE (Belgium), SARA LEE INTERNATIONAL (Belgium) and CARREFOUR (Spain).

She graduated in Business Administration at ICADE, and has a Master in Business Administration from Thunderbird Graduate School of Management, Arizona. Currently she is a PhD candidate working on her thesis in marketing. She is also a professor of the master MIM at IE and Marketing Strategy at ICADE.

She has given lectures at the master in "Talent Marketing" at the Universidad Pontificia Comillas, and Master in Distribution at CECO. Marta is fluent in Spanish, English and French.

mmartinm@faculty.ie.edu

PREREQUISITES

SUBJECT DESCRIPTION

Contemporary approaches to business emphasize the importance of adopting a consumer focus. Marketing, in particular, is a consumer-driven function that begins and ends with the consumer—from recognizing his or her needs to ensuring post-purchase satisfaction. In this course you will enhance your understanding of consumer behaviour, that is how and why people choose, use, and evaluate goods and services. The success of many companies and nonprofit organizations in genuine insights into the minds, hearts, and behaviors of consumers. Which product is going to be a hit, and which one is going to flop? Which aging brand can be revived, and which one is doomed to die? Whats the next big market trend? How does a business become more relevant to consumers? These are just a few of the many questions that businesses constantly face and that require genuine consumer insights. To gain a comprehensive understanding of consumer insights and behaviour different consumption companies and consumption situations (e.g., individual consumption, group consumption) will be studied.

LEARNING OBJECTIVES

The objective of the course is to provide key tools and frameworks for analyzing consumer behavior in order to solve marketing problems and define effective marketing strategy. Specifically, you will:

- To better Understand the consumer and its decision process .
- To Learn about relevant theories and research in behavioral sciences (e.g., psychology, sociolog,..) to study consumer behavior
- To Apply consumer behavior for developing and evaluating marketing strategies.

This course is intended for those interested in careers in brand management, advertising management, marketing management, and consulting. However, most of the issues covered are of further interest because in trying to understand consumers we ultimately seek to understand ourselves

We will use reading materials, case discussions, in-class examples and practical exercises as means to apply the principles learned during the lectures to real-world consumer behavior problems. In addition, you will be part of a team and conduct a consumer research project of your choice. For this purpose, you will choose a product category and design a strategy to get insight into the relationship between customers and products and improve this relationship.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10.0 hours
Discussions	26.67 %	20.0 hours

Exercises in class, Asynchronous sessions, Field Work	6.67 %	5.0 hours
Group work	26.67 %	20.0 hours
Individual studying	26.67 %	20.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

I. Introduction: What is consumer behavior?What are consumer insights?

II. Consumer as individual

- ⁃ Perception and attention
- ⁃ Persuasion: attitudes and judgment
- ⁃ Affect and motivation
- ⁃ Learning and memory
- ⁃ Personality and self-concept

III. Social persuasion and managerial decision making

- ⁃ Persuasion through social influence
- ⁃ Culture variables
- ⁃ Biases in managerial decision making

IV. Consumer insights and decision making process

- ⁃ Consumer insights
- ⁃ Stages of decision making
- ⁃ Consumer evaluation and choice
- ⁃ Risk and consumer decision making
- ⁃ Loyalty and fidelization.

CONTENT

In the sessions students will be asked to present part of the project, or do practical exercises.

SESSIONS 1 - 2 (LIVE IN-PERSON)

Introduction to consumer INSIGHTS and behavior.

Consumer Trends. Project groups

SESSION 3 (LIVE IN-PERSON)

Segmentation, Targeting, and Positioning. Practice

SESSION 4 (LIVE IN-PERSON)

Consumer Motivation and Personality. Consumer Needs. Practice

SESSION 5 (ASYNCHRONOUS)

Consumer Attitude Formation and Change. Perception. Practice Review

SESSION 6 (LIVE IN-PERSON)

Culture's Influence on Consumer Behavior. Subcultures and Consumer Behavior. Cross-Cultural Consumer Behavior. Case: Louis Vuitton in Japan. Harvard case- Product #:10M67-PDF-ENG. F2F

Practical Case: Louis Vuitton in Japan (HBS 910M67-PDF-ENG)

SESSION 7 (LIVE IN-PERSON)

Consumer Learning. Consumers insights.Practice

SESSION 8 (LIVE IN-PERSON)

Consumers insights and marketing research. Qualitative Research. Focus groups. Practice.

SESSION 9 (LIVE IN-PERSON)

Communication and Consumer Behavior. Practice

SESSION 10 (ASYNCHRONOUS)

. Reference groups and WOM. Practice. Review

SESSION 11 (LIVE IN-PERSON)

Consumer Insights. Decision-Making and Diffusion of Innovations. Loyalty and fidelization. Practice.

SESSIONS 12 - 13 (LIVE IN-PERSON)

Project Presentations

SESSION 14 (LIVE IN-PERSON)

Questions/doubts in order to prepare for the exam. Students must come prepared for this session.

SESSION 15 (LIVE IN-PERSON)

Final Exam

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	35 %		Individual
Project paper +Project presentation +Peer Review	50 %		Group+ individual

Class Participation	15 %		Individual

RE-SIT / RE-TAKE POLICY

A. CLASS PARTICIPATION /CASES (15%)

This part of the evaluation includes your attendance, how much you participate in the discussion in class, and assignment completion. If you do not attend, for whatever reason, you are forfeiting the opportunity to obtain the participation credit allotted to that session.

Three main criteria will be used in reaching our judgment about your class participation:

- Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

- Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

- Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

Grade 0-4,9 Criteria: When present, not disruptive. Tries to respond when called on but does not offer much. Demonstrates very infrequent involvement in discussion.
·Grade 5,0-6,9 Criteria: Demonstrates adequate preparation: knows basic reading facts, but does not show evidence of trying to interpret or analyze them. Offers straightforward information (e.g., straight from the reading), without elaboration or very infrequently (perhaps once a class). Does not offer to contribute to discussion, but contributes to a moderate degree when called on. Demonstrates sporadic involvement.
·Grade 7-8,9 Criteria: Demonstrates good preparation: knows reading facts well, has thought through implications of them. Offers interpretations and analysis of reading material (more than just facts) to class. Contributes well to discussion in an ongoing way: responds thoughtfully to other students' points, thinks through own points, questions others in a constructive way, offers and supports suggestions that may be counter to the majority opinion. Demonstrates consistent ongoing involvement.
·Grade 9,0-10,0 Criteria: Demonstrates excellent preparation: has analyzed readings exceptionally well, relating it to other material (e.g., other readings, course material, discussions, experiences, etc.). Offers analysis, synthesis, and evaluation of class material (e.g., puts together pieces of the discussion to develop new approaches that take the class further). Contributes in a very significant way to ongoing discussion: keeps analysis focused, responds very thoughtfully to other students' comments, contributes to cooperative argument-building, suggests alternative ways of approaching material and helps class analyze which approaches are appropriate, etc. Demonstrates ongoing very active involvement.
The professor will lay the ground rules for participation during Session 1 and will provide a mid-term "grade" after the mid-term exam.

Cases :

The format used for the case write-up is standardized and must be followed.

1. Problem Statement.

2. Situation Analysis.

3. Alternatives.

4. Recommendation.

5. Implementation Plan.

You have to come prepared and be active in the class discussion (same rules as in class participation). If you are not able to attend class the day of the case, you have to send a soft copy of the case write-up to the professor via email the day before.

B. FIELD PROJECT (40%)

This field project (FP) provides a hand-on opportunity to practice consumer behavior. You will work in a group of about five, in a given product category (e.g., food, detergents, sport goods, luxury goods ,etc.), carry out a study to analyze consumer behavior with respect to one or more competitors in this category, and discuss your findings. How do consumers engage in the pre-purchase, purchase, and post-purchase processes? What are the most relevant external and internal influences on these processes? What can the companies learn from these processes and how can they influence them? How should the companies change their marketing strategies to improve segmentation, product positioning, enhance consumer experience with the product, and influence their satisfaction? Etc. Some marketing research will be needed to develop a sound project. You will summarize your recommendations in a report and present it in class.

Groups will work (with the guidance of the professor) on the development of the FP. Students must bring to the session information and documentation searched in advance, in order to develop the document to be delivered at the beginning of next session (in paper). Students will be also asked to make short presentations to the class.

Students will form teams of 5 to 6 members .Teams are expected and required to meet regularly and work in their FP outside of class.

There will be a team presentation of the FP to the whole class. Each student must present a part of the FP. The FP documents will account for 15% of the grade and it will be the same for all members of the team. The presentations to the class will account for 15% of the grade and it will be assigned individually according to the quality of the work of each teammate. If you are absent or late the day of the presentation (no 5 minutes allowed that day) your grade will be a zero in this part, except medical justification. A hard copy of all practices and presentations must be delivered to the professor in class at the beginning of the corresponding session. The day of the presentation a hard copy of the final paper should be provided and a soft copy should be sent the day before.

Teams as a whole will be responsible for their general management and teammates will be asked to provide a written evaluation of their peers (10%). Therefore of all team members are expected to collaborate and work diligently to achieve the best possible results. Thus, attendance to all practise sessions will be compulsory to ensure a team effort and any unjustified absence will be penalized. Peers in each team will assign each other a contribution grade (% of contribution to the project). Instructions on how to complete your Peer Evaluation will be given during sessions.

You need at least a grade of a 5 in the total project grade to pass this class. If you have not obtained a 5 it will not average with the rest of your grades.

C. FINAL EXAM (45%)

The exam will be based on all the materials discussed during the semester (lectures, class discussions, assigned readings, guest speakers, and class assignments).

Re-grade requests have to be submitted in writing explaining why you believe that your answer, as written, was incorrectly graded. The re-grade will consider again the whole exam, so the final grade may be increased as well as decreased. Revisions will be in person and there is no possibility to change the date, hour or location.

You need at least a grade of a 5 in the exam to pass this class. If you have not obtained a 5 it will not average with the rest of your grades.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

Regarding to the newly implemented ´liquid learning´ model, all students must still abide by the same IEU attendance policy, including those students who are connecting remotely to class sessions and not physically in the classroom because they are unable to be physically in Spain, on campus. During the sessions, students connecting remotely are required to fully connect their camera and microphone at all times, and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

ØStudents failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll

in the course during the next Academic Year).

ØIt is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

ØThe June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

ØRe-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

PROFESSOR BIO

OTHER INFORMATION

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a retaker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed

calls to pass a given subject or course, in order to remain in the program

BIBLIOGRAPHY

Recommended

- Leon G. Schiffman, J.L Winsenblit. (2021). *Consumer Behavior.* 12th edition.

Pearson. ISBN 9780137504503 (Printed)

 - Robert B. Cialdini. (2006). *Influence: The Psychology of Persuasion.* Harper Business. ISBN 9780061241895 (Printed)

   Suggested Additional Readings. Students who are interested in additional background on consumer behavior or wish to go deeper into certain topics may also find tthis book useful

 - Paco Underhill. (2008). *Why We Buy: The Science of Shopping--Updated and Revised for the Internet, the Global Consumer, and.* Simon & Schuster. ISBN 9781416595243 (Printed)

   Suggested Additional Readings. Students who are interested in additional background on consumer behavior or wish to go deeper into certain topics may also find this book useful

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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CYBERSECURITY

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 CYBS-NBA.1C.d.OPT.M.A

Area Others

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JULIO SAN JOSE SANCHEZ**

E-mail: jsanjoses@faculty.ie.edu

PERSONAL INFORMATION

He has a professional career of more than thirty years dedicated to security in all its disciplines. Julio San José is currently Managing Director at Alavarez & Marsal. Previously worked at EY, where he was the Partner leading of Cybersecurity for Financial Services at EY. Prior to joining EY, he held positions of responsibility in several banking groups (Bankinter, Sistema 4B, LeasePlan, etc.) in the areas of security, cyber security and fraud prevention. He is Director of Private Security, is Certified Information Security Manager (CISM) and Certified in Risk and Information Systems Control (CRISC) by ISACA. Lead Auditor BS 7799 and BS 25999 by the British Standard Institution. As a member of the Subcommittee on Computer Security (CTN 71 / SC27), he has collaborated in the drafting of several standards, both national and international.

He is a cited expert, collaborator and participant in courses, articles and debates on matters relating to new technologies, information systems and security.

Julio is an accomplished leader with expertise in security innovation, technology and IT management, IT security, risk management, compliance, and IT audit.

Academic background

- Management program (IESE Business School)
- Master in Information Technology Management (IDE-CESEM)
- Member of the Expert Group of the Risk Management Chair of the Instituto de Empresa
- Editor of part three of the PNE 71505 Electronic Evidence Management System standard
- Lecturer for the Master's in International E-business Master Ceco-ICEX
- Author of several patents in the protection of mobile applications.

Professional Background

- Managing Director at Alvarez&Marsal
- Partner leading of Cybersecurity for Financial Services at EY
- Head of Technical Security

Edited by Documentation
25th August 2023

- Head of Technological Risk
- Founder member of the Spanish Association of Electronic Evidence (AEDEL).
- Founder member of the Instituto de Continuidad de Negocio (CONTINUAM).
- Co-authored the book "*Seguridad de las tecnologías de la información : la construcción de la confianza para una sociedad conectada*".
- SIC Magazine Award 2011.

Contact details

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PREREQUISITES

None

SUBJECT DESCRIPTION

In business, cyber security has become a matter of concern for all aspects of companies. The emergence of new businesses in the digital world means that the greater the digitalization, the higher the dependence on cyber security. On the other hand, the rapid adoption of technology means that there is a lack of qualified professionals who know how to understand the risks derived from the rapid adoption of new technologies, the main challenge being the training of these professionals who are capable of facing up to the new situation.

LEARNING OBJECTIVES

Our companies are increasingly dependent on technology and the tendency is to increase this dependence even more. This makes us increasingly vulnerable to what has come to be called cybercrime (remember that not all hackers are cybercriminals) and forces us to manage new risks both in our personal lives and in the business world. Knowing our vulnerabilities and how to defend ourselves against them is now a question of business survival.

In this course we will know and learn aspects of cyber security about who are their targets, who the attackers are and what are their motives. We will see and develop strategies to help you be more convincing and help you make the right security decisions. You will also build an extensive toolkit to help you show the benefits your proposals bring to your business.

This includes influencing and convincing key decision makers, both inside and outside your company, to assist in the strategic implementation of cybersecurity plans.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

This is designed to be a student-centered, highly interactive course, where students learn from each other's experiences and discussion in class, working groups and other forums. In that sense, while the course is designed to provide you with interesting materials and facilitated discussion to frame learning, much of your learning depends on you; your engagement, preparation, active participation, and your ongoing reflection.

In order to help in the learning experience we will use the following channels nline enriched material, using technology capabilities to share information, concepts and stories using videos or other multimedia material.

- Lectures and readings, included in the syllabus: you will be exposed to a set of concepts through lectures, readings, and case discussions.
- One Practical Case and one reading will be presented each session, with additional readings (optional) to expand your knowledge if interested

You are expected to prepare all material to ensure the time of group and class discussion is used to enrich our experience by showing application of knowledge.

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10.0 hours
Discussions	26.67 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	33.33 %	25.0 hours
Individual studying	6.67 %	5.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Digital world…Is it secure?

In this first session we will see the importance that cyber security has taken in this digital world making it possible to talk about trust. Here is where you play a key role in helping the organization to make best decisions. In this first session we will discuss some examples of attacks, to help us realize the tools we can have in the toolkit for protection, and the basic information you can get from various sources.

Article: Why the Entire C-Suite Needs to Use the Same Metrics for Cyber Risk (HBS H040UR-PDF-ENG)

Working Paper: Cybersecurity, emerging technology and systemic risk (World Economic Forum)

Video: A vision of crimes in the future (Youtube)

SESSION 2 (LIVE IN-PERSON)

We are under attack

The behavior of humans is the most likely cause of the break in the security chain, there are many cases where a 'small' human error opens the doors of our systems to attackers. But who or what interest have those attack us?. Are they Lone Wolves, competing corporations, nations?

Article: In Defence of the Human Factor (Frontiers)

SESSION 3 (LIVE IN-PERSON)

Attack methods

The methods of attack are many and varied but all of them contain basic elements based on the exploitation of vulnerabilities, we will see the different methods and who has specialized in each of them.

Practical Case: Maersk (Will be Provided)

Video: What would a cyber attack look like in the real world? (Youtube)

SESSION 4 (LIVE IN-PERSON)

Organizational resilience: I SURVIVED A CRISIS

A session on crisis management. Very interesting cases to understand the situation where company critical operations are at stake, what to do and how to interact with different stakeholders during and after the crisis, and also what to do to avoid the crisis to happen.

Practical Case: Who Should Take the Fall? (HBS R1507X-PDF-ENG)

Practical Case: IPremier Co. (A): Denial of Service Attack (HBS 609092-PDF-ENG)

Practical Case : Sownage: Cyber security and business continuity (IST010055-U-ENG-HTM)

SESSION 5 (LIVE IN-PERSON)

Protecting your Privacy

Privacy is, as you know by now, a critical asset to protect both at corporate and individual level. We had interesting situation such as the US Navy bases located thanks to the information from fitness wearables, that endanger the privacy (and much more) because of misuse of information. We will also address the practical case of Target and how this can impact the "numbers" of the company.

Practical Case: Cyber Breach at Target (HBS 117027-PDF-ENG)

Other / Complementary Documentation: Privacy Leaders' Views - The Impact of COVID-19 on

Privacy, Priorities, Practices and Programs (IAPP)

SESSION 6 (LIVE IN-PERSON)

Audit and Compliance

Another important tool for security managers is the use of Audits and compliance reports. No matter if it is the ISO 27001 framework, or the NIST one, which are the benefits of the use of internal or external expert view on the protection level of the company? How can this help us in different situations, such as insurance cost?

Article: The Role Of Cyber Security In Compliance (Cyber Security Hub)

SESSION 7 (LIVE IN-PERSON)

Compliance and regulation

One of the main drivers of security investments in the last years has been the compliance with the complex (and with growing complexity) of regulations, laws, and so on. We will discuss some of the main ones to comply with, the risks for not compliance, and the opportunity that brings to convince some of the C-level members that still have doubts. Names such as GDPR become critical as some of our ways to address the board.

No matter if it is the ISO 27001 framework, or the NIST one, which are the benefits of the use of internal or external expert view on the protection level of the company?. How can this help us in different situations, such as insurance cost?

Article: 5 ways for business leaders to win in the 2020s (World Economic Forum)

SESSION 8 (LIVE IN-PERSON)

Audit and Forensic - eDiscovery

Another important tool for security managers is the use of Audits, forensic and in general terms, all methods for processing of identifying and delivering electronic information that can be used as evidence in legal cases. (eDiscovery).

Article: Electronic Document Storage And E-Discovery: A Way Forward (Corporate Counsel

Business Journal)

SESSION 9 (LIVE IN-PERSON)

Persona surface attack - Digital Shadow

It is very important to be aware that each of our activities leaves a trace in the cyberworld. We will refer to these traces as Digital Shadow or Digital Footprint. Have you heard about it before? It is very important that we know how to protect it, because stopping using technology does not seem to be a viable option, does it? So how often should we delete cookies?

Article: Understanding your digital shadow (University of Wollongong)

Article: Privacy under Surveillance Capitalism (Johns Hopkins University Press; social research Vol. 84 : No. 1: Spring 2017) (CED)

SESSION 10 (LIVE IN-PERSON)

In this session we will have a guest with extensive experience in cybersecurity. He will talk to us about his experience in the defensive and offensive aspects, we will have time for Q&A.

SESSION 11 (LIVE IN-PERSON)

Your cybersecurity plan

In this session we will cover the importance of your cybersecurity plan, and how to convince your managers. Once you have the attention of our C-level. How do we make sure we invest in the "right" things? How can we decide between a "good" and a "great" investment?.

Article: How Organizations Can Ramp Up Their Cybersecurity Efforts Right Now (HBS H05LDO-PDF-ENG)

SESSION 12 (LIVE IN-PERSON)

Digital transformation and risk, our reliance on technology

Our dependence on technology is increasing although we could say that it is total, but what happens when the intrinsic failures that technology has. Cyber is something transversal, as the digitalization of things advances, 'trust' will become the protagonist. We will see the case of the 'connect car' and the importance of security that has gone from protecting us against theft to protecting our lives with autonomous driving.

Article: We need to reduce our dependence on technology if we want to keep innovating (TNW)

Article: "Digital Reliance": Public Confidence in Media in a Digital Era (Georgetown Journal of International Affairs, Fall 2017, Vol. 18, No. 3, International Engagement on Cyber VII (Fall 2017), pp. 3-10) (CED)

SESSION 13 (LIVE IN-PERSON)

Intelligence: know what come next

Knowing our enemy and trying to anticipate him is a difficult but essential task at this time. We will see cases of how companies prepare to 'see' what is happening outside and what their attack surface is

Article: 2020 Global Threat Intelligence Report (NTT)

SESSION 14 (LIVE IN-PERSON)

Convincing your boss

In this session, the final papers will be presented and prestigious professionals from the business world will attend. You will have to present and convince them of your work

SESSION 15 (LIVE IN-PERSON)

Lessons Learned

EVALUATION CRITERIA

Class participation: is essential in order for you to reach the learning outcomes, and also to share with others. Your active participation will be graded in each of the discussions held in the session, the idea is to have open discussions and ask anything you are curious to know about... Remember it is more important to have quality interventions than quantity. In a few words...the idea is to have open discussions and ask anything you are curious to know about...

Individual contribution: Each student will be 3 times presenting individually to the class in different situations, for them to convince diverse stakeholders. Each of the interventions will be graded using design thinking (Feasibility, Viability and Desirability) of their solutions, along with the capability to convince their stakeholders in the topic assigned. Each intervention will be 5 minutes long.

Group deliverable: Each group will have to convince to board in their implementation of a security plan. Details will be shared prior to the challenge. This exercise will require a 15 minutes presentation and 5 minutes Q&A

criteria	percentage	Learning Objectives	Comments
Individual Work	30 %		
Group Presentation	40 %		
Class Participation	30 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

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- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

- Lillian Ablon, Martin C. Libicki, Andrea A. Golay. Lillian Ablon, Martin C. Libicki,

Andrea A. Golay. *Markets for Cybercrime Tools and Stolen DataHackers.* RAND Corporation.. ISBN 0833087118 (Digital)

This report describes the fundamental characteristics of 'black markets' and how they have grown into their current state in order to give insight into how their existence can harm the information security environment.

- Bruce Schneier. *Liars and Outliers Enabling the Trust that Society Needs to Thrive.* First. John Wiley & Sons. ISBN 1118143308 (Digital)

This book reaches across academic disciplines to develop an understanding of trust, cooperation, and social stability. From the subtle social cues we use to recognize trustworthy people to the laws that punish the noncompliant, from the way our brains reward our honesty to the bank vaults that keep out the dishonest, keeping people cooperative is a delicate balance of rewards and punishments. It's a series of evolutionary tricks, social pressures, legal mechanisms, and physical barriers.

- Richard A. Clarke, Robert K. Knake. *THE FIFTH DOMAIN: DEFENDING OUR COUNTRY, OUR COMPANIES, AND OURSELVES IN THE AGE OF CYBER THREATS.* Penguin. ISBN 0525561965 (Digital)

Journey through what NATO already knows as the 'fifth domain' showing the darkest and most sinister aspects of cyberspace through the eyes of researchers, executives and relevant people working to make it safer.

BEHAVIOR RULES

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DATA MINING AND MACHINE LEARNING FOR BUSINESS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 DMML-NBA.1C.p.OPT.M.A

Area Operations and Business Analytics

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **GILBERT BERGNA**

E-mail: gbergna@faculty.ie.edu

GILBERT BERGNA

- Mechanical Engineer from the École Polytechnique Fédérale - Lausanne Switzerland
- MBA Babson College (Massachusetts - USA)
- Independent consultant in Data Analysis and Marketing Research

- Professor of Data Analytics for Decision Making,at IE Business School (MIM)

- Professor of Quantitative Techniques for MArketingResearch,at IE Business School (BBA)

- Professor at the IESA (Institute of Higher Studies of Administration, Venezuela), for more than10 years, in Marketing Research and Data Mining for Marketing, among others
- Professor of Data Analytics,at the Masters of Marketing at the Universidad Finis Terrae, Chile Founder of "Club Inteligente", multi loyalty club companies, leveraging affiliated companies with data mining information collected by the program.

Monday, Wednesday and Friday from 18.00 h to 20.00 h
emails: gbergna@faculty.ie.edu , gilbertobergna@hotmail.com

PREREQUISITES

No formal prerequisite is necessary for this course.
It only requires very basic math and statistics knowledge

SUBJECT DESCRIPTION

Data Mining, and particularly, Machine Learning, have become essential tools for companies, from Start-Ups to Corporations, which use them as an important decision-making support. The goal is to extract useful information, hidden in the large amounts of data they generate and/or that they have the possibility to access.
The business manager has, at least, to be aware of these techniques, to:

1. Know their potential and limitations,
2. To interact with the specialist (Data Scientist), and generate sensible requirements
3. To understand and interpret the results

This course is aimed at different profiles: decision makers, analysts, staff of financial, marketing and sales areas, among others.
It is a business course, not technical or scientific oriented, and consequently, no previous knowledge in coding, advanced statistics or math is required.
However, this is a "Hands-On" course. This means, the student will work with "real" data, and use of one of the most popular and powerful Data Mining tools (KNIME), to perform the major Machine Learning Algorithms, from simple linear regression to the latest XGBoosting technique, in a simple and intuitive way.
It is a workshop, in which the teacher guides the student, through multiple practices, so that the student can understand what he is doing, what he is doing it for, how to interpret the results, and finally, be able to extrapolate these techniques to other situations in the future.

LEARNING OBJECTIVES

The general objective of the Course, is to provide the student with the understanding of the most important Machine Learning algorithms, and their application in Business situations, with a practical approach.

SPECIFIC OBJECTIVES (Expected Learning)
To know the basics and definitions of the Data Mining process
To understand the most relevant Data Mining/Machine Learning algorithms, and their correct applications in different business situations:

- Regressions
- Classifications
- Clustering
- Associations (recommendation engines)

- Introduction to Text Mining

- To learn how to use KNIME, an intuitive software (Graphic drag-and-drop interface), with "real" business data, to implement the different algorithms (NO coding required)

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

"Theory" sessions, i.e. exhibition classes describing the different algorithms and their applications in Business. They correspond to an "intuitive" description of the concepts, without theoretical presentation of the fundamentals of each technique.

- Practice of such algorithms, with KNIME, along with the instructor

- The data sets necessary for the practice will be provided,

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	24.0 %	18.0 hours
Discussions	8.0 %	6.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	32.0 %	24.0 hours
Individual studying	16.0 %	12.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Sustainability Topics:

- Social Challenge
- Economic Development

INTRODUCTION TO DATA MINING/MACHINE LEARNING
- Data Mining in Time
- What it is and why data mining
- Uses of Data Mining
- Data Mining Processes
- Most Commonly Used Algorithms
- Introduction to Machine Learning with KNIME

DECISION TREES
- Theoretical Concepts
- Model Accuracy Measures
- Main indicators
- Indicators case study
- Classification Tasks (Example)
- Practice Classification Trees
- Practice Regression Trees

SESSIONS 3 - 4 (LIVE IN-PERSON)

Sustainability Topics:

- Environment

- Social Challenge

- Economic Development

REGRESSIONS
- Linear Regression
- Multiple Regression
- Regression Logistics Application: Credit Scoring
- Pre-Processing Practice
- Linear Regression Practice
- Logistic Regression Practice

RANDOM FOREST
- Random Forrest description and example
- Random Forest Classification Practice
- Random Forest Regression Practice

SESSIONS 5 - 6 (LIVE IN-PERSON)

NEURAL NETWORKS
- Neural Networks: Theoretical Concepts
- Neural Model
- Advantages and Disadvantages
- Practice Neural Networks Classification
- Practice Neural Networks Regression

****

SVM AND KNN
SVM
- SVM: Definition and operation
- And Nonlinear Cases. Examples
- Advantages and Disadvantages
- Support Vector Machine Classification Practice (SVM)
- Support Vector Machine Regression (SVR)
KNN
- KNN Definition
- KNN Practice

Own Material: NEURAL NETWORKS

Own Material: KNN

SESSION 7 (LIVE IN-PERSON)

TEST #1

MULTIPLE CHOICE QUESTIONS

SESSIONS 8 - 9 (LIVE IN-PERSON)

XGBOOSTING
- XGBOOSTING Definition
- XGBOOSTING Practice

COMPARING DIFFERENT CLASSIFICATION MODELS
Up to this point, we have seen individual classification models, and its evaluation in a R.O.C. graph.
In this section, we will see how to generate a single graph where different classification models can
be visually evaluated and compared, with the ROC curve.

SESSIONS 10 - 11 (LIVE IN-PERSON)

Sustainability Topics:

- Environment

- Social Challenge

CLUSTERING
- K-Means Cluster Analysis
- Why Clustering?
- Clustering Steps
- K-Means Cluster Analysis Practice

PRINCIPAL COMPONENTS ANALYSIS - PCA
- PCA definition and uses
- PCA practice

SESSION 12 (LIVE IN-PERSON)

Sustainability Topics:

- Social Challenge

MARKET BASKET ANALYSIS
- Associations: Metrics
- Associations: Sequential Patterns
- 10 Market Basket Analysis

SESSIONS 13 - 14 (LIVE IN-PERSON)

Sustainability Topics:

- Social Challenge

TEXT MINING PART 1
Introduction to Text Mining

TEXT MINING PART 2
Text Mining in action (Part 2)

SESSION 15 (LIVE IN-PERSON)

TEST #2
MULTIPLE CHOICE QUESTIONS

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	15 %		
Intermediate Tests	15 %		
Group Work 2	35 %		
Group Work 1	35 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July. Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.
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ØThe June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.
ØRe-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

! Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

! In case you decide to skip the opportunity to re-sit for an exam or evalu ation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- Sharda R., Dursun D., Turban E. (2018). *Business Intelligence, Analytics, and Data Science: A managerial perspective..* 4TH. Pearson. ISBN 0134633288 (Digital)

- - Berry, M.J.A.,Linoff, g. (2011). *Data Mining Techniques For MArketing, Sales, and Customer Suport.* 3D. JOHN WILEYB&SONS. ISBN 0470650931 (Printed)

BEHAVIOR RULES

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07th July 2023

DERIVATIVES AND RISK MANAGEMENT

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 DRM-NBA.1C.f.OPT.M.A

Area Others

Number of sessions: 25

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 5.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JUAN MIGUEL MARTINEZ HERRERA**

E-mail: jmartinezh@faculty.ie.edu

Juan is currently managing partner of Prudentia Capital, an investment consulting firm.

From 2010 to 2015, he was an Executive Director at UBS, where he headed the Equity Derivatives team for Iberia.

Before joining UBS, he worked for Santander Global Banking and Markets, in the Derivatives Sales and Structuring teams.

Previous to that, he was a management consultant at Oliver Wyman.

He holds a MSc. in Engineering from ICAI (Madrid, Spain) and an MBA from INSEAD (Fontainebleau, France).

Juan is a CFA® charterholder and holds the FRM (Financial Risk Manager) certification from GARP (Global Association of Risk Professionals).

jmartinezh@faculty.ie.edu

PREREQUISITES

Good knowledge and understanding of:

- Statistics

- Microsoft Excel

- Bonds and Stocks

- Financial Accounting

- Time Value of Money and Calculations of Returns

SUBJECT DESCRIPTION

The objective of this course is to explain what derivatives are and the applications they have, in particular in the risk management space.

Very often, both the general public and the investment professionals feel intimidated by derivatives and perceive them as dangerous. Warren Buffett famously said: "Derivatives are financial weapons of mass destruction.". This course will attempt do demistify them and show how useful they can be.

Also, the course will explain the main types of risks than financial institutions face. In 2023 we saw how faulty risk management can lead to the bankruptcy of large financial instutions like Credit Suisse or SVB. And these two examples pale in signicance when compared to the events of the global financial crisis of 2008.

A good understading of derivatives combined with the analysis and management of risk is an essential tool-kit for those wanting to pursue a career in Banking or Investment Management.

LEARNING OBJECTIVES

The objective of the course is to gain a good understanding of:

- Main types of derivatives (forwards, swaps and options) from three different angles: mechanics, pricing and appications.

- Main types of financial risks (market, credit, operational and liquidity) from two different angles: measurement and management (hedging).

- Banks and their risks, as they are the most systemic players in the financial world.

- Derivatives and risk management mishaps: past real life situations of failure.

TEACHING METHODOLOGY

The course will mix theory with practical application, as well as analysis real-life cases. Students are expected to actively participate in the whole process to build their knowledge and sharpen their skills.

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	36.0 %	45.0 hours
Discussions	12.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	8.0 %	10.0 hours
Group work	16.0 %	20.0 hours
Individual studying	28.0 %	35.0 hours
TOTAL	100.0 %	125.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

UNDERSTANDING FINANCIAL INSTITUTIONS AND HOW THEY TRADE
- OTC vs ETD
- ISDA & CSA Agreements

SESSION 2 (LIVE IN-PERSON)

FUTURES & FORWARDS

- Mechanics & Pricing
- Carrying costs and yield for different underlying types
- CASE: Negative oil future prices in 2020

SESSION 3 (LIVE IN-PERSON)

FUTURES & FORWARDS

- Mechanics & Pricing
- Carrying costs and yield for different underlying types
- CASE: Negative oil future prices in 2020

SESSION 4 (LIVE IN-PERSON)

FUTURES & FORWARDS

- Mechanics & Pricing
- Carrying costs and yield for different underlying types
- CASE: Negative oil future prices in 2020

SESSION 5 (ASYNCHRONOUS)

FUTURES & FORWARDS

- Mechanics & Pricing
- Carrying costs and yield for different underlying types
- CASE: Negative oil future prices in 2020

SESSION 6 (LIVE IN-PERSON)

SWAPS

- Mechanics & Pricing
- Interest rate swaps
- Credit default swaps
- Equity swaps
- CASE: Credit Suisse trades with Archegos

SESSION 7 (LIVE IN-PERSON)

SWAPS

- Mechanics & Pricing
- Interest rate swaps
- Credit default swaps
- Equity swaps
- CASE: Credit Suisse trades with Archegos

SESSION 8 (LIVE IN-PERSON)

SWAPS

- Mechanics & Pricing
- Interest rate swaps
- Credit default swaps
- Equity swaps
- CASE: Credit Suisse trades with Archegos

SESSION 9 (LIVE IN-PERSON)

OPTIONS

- Mechanics & Pricing
- Plain vanilla options & Option Strategies
- Exotic Options
- Structrured products
- Greeks (option sensitivities)
- CASE: Tail risk hedging
- CASE: Structured Products

SESSION 10 (LIVE IN-PERSON)

OPTIONS

- Mechanics & Pricing
- Plain vanilla options & Option Strategies
- Exotic Options
- Structrured products
- Greeks (option sensitivities)
- CASE: Tail risk hedging
- CASE: Structured Products

SESSION 11 (ASYNCHRONOUS)

OPTIONS

- Mechanics & Pricing
- Plain vanilla options & Option Strategies
- Exotic Options
- Structrured products
- Greeks (option sensitivities)
- CASE: Tail risk hedging
- CASE: Structured Products

SESSION 12 (LIVE IN-PERSON)

OPTIONS

- Mechanics & Pricing
- Plain vanilla options & Option Strategies
- Exotic Options
- Structrured products
- Greeks (option sensitivities)
- CASE: Tail risk hedging
- CASE: Structured Products

SESSION 13 (LIVE IN-PERSON)

MIDTERM EXAM

SESSION 14 (LIVE IN-PERSON)

 MARKET RISK

- Measuring market risk: volatility, drawdown, VaR
- Market risk hedging and managing with derivatives
- Leverage through derivatives
- CASE: Calculating risk metrics for a real portfolio

SESSION 15 (LIVE IN-PERSON)

 MARKET RISK

- Measuring market risk: volatility, drawdown, VaR
- Market risk hedging and managing with derivatives
- Leverage through derivatives
- CASE: Calculating risk metrics for a real portfolio

SESSION 16 (LIVE IN-PERSON)

 MARKET RISK

- Measuring market risk: volatility, drawdown, VaR
- Market risk hedging and managing with derivatives
- Leverage through derivatives
- CASE: Calculating risk metrics for a real portfolio

SESSION 17 (ASYNCHRONOUS)

 MARKET RISK

- Measuring market risk: volatility, drawdown, VaR
- Market risk hedging and managing with derivatives
- Leverage through derivatives
- CASE: Calculating risk metrics for a real portfolio

SESSION 18 (LIVE IN-PERSON)

 CREDIT RISK

- Drivers of credit risk
- The credit rating agencies
- The subprime crisis
- Credit risk management with derivatives
- Collateral in derivatives trades
- CASE: The big short (movie)
- CASE: Lehman brothers bankruptcy

SESSION 19 (LIVE IN-PERSON)

 CREDIT RISK

- Drivers of credit risk
- The credit rating agencies
- The subprime crisis
- Credit risk management with derivatives
- Collateral in derivatives trades
- CASE: The big short (movie)
- CASE: Lehman brothers bankruptcy

SESSION 20 (ASYNCHRONOUS)

CREDIT RISK

- Drivers of credit risk
- The credit rating agencies
- The subprime crisis
- Credit risk management with derivatives
- Collateral in derivatives trades
- CASE: The big short (movie)
- CASE: Lehman brothers bankruptcy

SESSION 21 (LIVE IN-PERSON)

OPERATIONAL RISK

- Types of operational risk
- CASE: Madoff
- CASE: Jerome Kerviel and other rogue traders

SESSION 22 (LIVE IN-PERSON)

LIQUIDITY RISK

- Liquidity trading risk
- Liquidity funding risk
- CASE: Woodford & H2O

SESSION 23 (LIVE IN-PERSON)

RISK MANAGEMENT AT BANKS

- Regulation
- CASE: SBV Bank in 2023
- CASE: Credit Suisse in 2023

SESSION 24 (LIVE IN-PERSON)

DERIVATIVES & RISK MANAGEMENT MISHAPS AND LEARNINGS FROM THE PAST

SESSION 25 (LIVE IN-PERSON)

FINAL EXAM

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	30 %		FINAL EXAM
Intermediate Tests	30 %		MIDTERM EXAM
Intermediate tests	0 %		
Group Work	0 %		
Other	0 %		
Group Presentation	20 %		
Class Participation	20 %		
Class Participation	0 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

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subjects.

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BIBLIOGRAPHY

Recommended

 - John C. Hull. *Options, Futures, and Other Derivatives.* 11th Edition (previous editions are also valid). ISBN 9781292410654 (Printed)

BEHAVIOR RULES

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DIGITAL MARKETING AND ANALYTICS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 DIMA-NBA.1C.m.OPT.M.A

Area Marketing and Communication

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **PIERRE AUGER**

E-mail: pauger@faculty.ie.edu

Pierre is a multicultural senior business and entrepreneurial executive (has lived in six countries) with extensive experience in both digital and content worlds, coupled to a very solid marketing background in leading FMCG.

Graduated with a degree in Business Administration and Commerce (Major in Marketing) @ Sup De Co , holds an MBA degree from @ICADE BusinessSchool, a Master in Digital Business (MIB) from @ISDILeading Internet Business School, a Master in Communication Management and New Technologies from @ Universidad Juan Carlos 1º (URJC) . He is now a PhD candidate, working on his thesis about recomenders systems in fashion ecommerce. He is a "Digital Optimist", new technologies firm believer and enthusiast, with a wide marketing experience covering areas such as Digital, Start-ups , FMCG, Content and Entertainment, Retail or Car industry.

Pierre has had the opportunity to work at leading multinational companies such as AMC Networks, Voddler, Technicolor, Gillette (Procter & Gample group), Dreamworks Animation, Universal and Paramount Pictures or PSA/Citroën, in Country Manager/Vice President, EMEA Commercial Director, Sales and Marketing Director roles, where he has always been seen as the "Digital Chief Evangelist Officer". Pierre currently advises several start-ups Boards as an Advisor and Board member as well as Entrepreneur.

More info: es.linkedin.com/in/augerpierre

After/before the lessons, upon students' previous request. Anytime via e-mail / twitter /Linkedin. Contact details: Email: pauger@faculty.ie.edu / Twitter: @augerpie

PREREQUISITES

SUBJECT DESCRIPTION

Within this subject, the students will become acquainted with the principles of the Internet, digital marketing, metrics and analytics as well as the digital trends, while gaining a general understanding of on-line ecosystems. Becoming aware of the new age of media (paid, earned and owned), marketing and e-business, as well as instinctively knowing how to take them into account when running a company or marketing a brand, is today a must for entrepreneurs and marketers in a world where the digital breach is growing among businesses.

LEARNING OBJECTIVES

The objective of this course is to introduce students to the concepts and activities that include and cover any digital business, as well as to provide practice in addressing and solving digital business and digital marketing problems. Above all, to obtain a specific mindset that allows a quick and balanced adaptation and integration of new technological and digital business trends.

This course is designed for students:

- To be able to understand, evaluate, put in place and manage: digital marketing and digital business, media, social media and specific digital strategies (search, mobile, ecommerce...).
- To be able to use them for the benefit of a brand or a business, driving positive sales and awareness.
- To be able to approach and understand a digital transformation process.
- Understand how digital metrics are paramount to any digital business
- Develop skills of critical and analytical thinking to evaluate and solve digital marketing-related problems.
- Understand the importance of ESG in today's company & overall digital marketing strategy.

TEACHING METHODOLOGY

This Digital Marketing course I is a hybrid, flexible and agile model of education that combines synchronous and a few asynchronous sessions, group works with a hands-on approach.

As a hands-on course, it combines a wide variety of concept learning tools (reading, lectures, videos, forums...) with skills development exercises (team activities, role plays, sharing, feedback). The idea is that studen develop their skills to analyze, develop and manage digital marketing approach, from strategy to the execution with this hands-on methodology, learning from other benchmarks and learning by doing. The course is composed by 25 Synchronous and 5 Asynchronous sessions, as follows:

- Individual activities: Social media assignment, Mid-term Exam, Final Exam, discussions.
- Group activities: Course Final Project (split into 2 phases / midterm and final term Presentations), Digital Topics research and final presentation, discussions.
- Diverse learning tools: Readings, slides, videos, forums, exercises, coaching online sessions face to face with the professor, group works...

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	40.0 %	60.0 hours
Discussions	10.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	30.0 hours
Group work	20.0 %	30.0 hours
Individual studying	10.0 %	15.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Sustainability Topics:

- Environment
- Governance

HOUSEKEEPING SESSION

- Housekeeping.
- Presentation and program expectations.
- General digital marketing and analytics course review.

Technical note & tutorials: Digital marketing tools (MKS020051-U-ENG-HTM)

SESSION 2 (LIVE IN-PERSON)

INTRODUCTION TO THE STUDENTS OF THE EXPECTED GROUP WORKS / PROJECTS ASSIGNMENTS :

1) RESEARCH DIGITAL TOPICS: Students (group work) will have to develop a comprehensive research on the following selected key topics, and develop a corresponding paper and a group presentation. The groups presentations dates will be organized when the final number of students is set, and will happen in a dedicated time of 15'+5' Q&A, along the course sessions. Topics are as follows:

- Blockchain (grp1)
- AR & VR / metaverse (grp2)
- AI/Machine learning/Robotics (grp3)
- Omnichannel (grp4)
- Big data (grp5)
- Internet of things (grp6)
- Mobility (grp7)

2) THE FINAL COURSE " DIGITAL BUSINESS & MARKETING PROJECT": Students (group work) will have to group and chose a current offline business that they will have to migrate to the new "digital age", leveraging all the digital tools covered during the course. This session will be dedicated to the explanation of what the Professor expects as well as work load phases. => Digital project settings.

This Digital Marketing plan will be structured in 2 phases, and therefore there will be 2 presentations (one around midterm covering some specific sections and the final one at the end of the course)

Exact instructions and detailed expected content to be covered will be explicitly shared in Session 1 and 2.

Activity:

- *Discussions and learnings.*

SESSION 3 (LIVE IN-PERSON)

THE DIGITAL WORLD / DIGITAL MARKETING:

General digital business course overview.

Activity:

- *Discussions and learnings.*

Technical note & tutorials: Business Goals for Digital Marketing (MKS020203-U-ENG-VID)
Technical note & tutorials: Internet of Things (IST020081-U-ENG-HTM)

SESSION 4 (LIVE IN-PERSON)

Sustainability Topics:

- Environment

THE DIGITAL ECOSYSTEM KEY TRENDS

Strategic dynamics digital environment.

Activity:

- *Discussions and learnings.*

Book Chapters: Rick Levine and Doc Searls. "The cluetrain manifesto" (See Bibliography)
Article: Euromonitor's site on Sustainability (Sustainability trends providing timely insights on shifting consumer preferences and the latest innovations, strategies and investments shaping governments and business agendas) (euromonitor.com)
Article: How consumers are embracing sustainability (Deloitte)

SESSION 5 (LIVE IN-PERSON)

Sustainability Topics:

- Environment
- Governance
- Social Challenge
- Economic Development

METRICS AND ANALYTICS:

THE WHY, WHAT, AND HOW THE METRICS WORLD WORKS

Activity:

- *Discussions and learnings.*

Technical note & tutorials: Defining the Right Metrics (ENT020204-U-ENG-VID)

SESSION 6 (ASYNCHRONOUS)

INFLUENCE MARKETING: The Open Brand Model

Activity:

- *Activity in small groups of 3 students: following the methodology proposed by the Professor, analyse the social media presence and reach of a brand of your choice, as well as a couple of other brands in the category to benchmark. This exercise is inspired by the OPEN Brand concept.*
- (Reference book): INFLUENCE MARKETING / THE OPEN BRAND CONCEPT (The Open Brand: When Push Comes to Pull in a Web-Made World).

Book Chapters: Jeremy Preace. "Social Media Marketing for Business 2020" (See Bibliography)(Optional)

Book Chapters: Andrew Macarthy. "500 Social Media Marketing Tips: Essential Advice, Hints and Strategy for Business" (See Bibliography)(Optional)

Book Chapters: Kelly Mooney and Nita Rollins, "The open brand: when push comes to pull in a web-made world" (See Bibliography)

SESSION 7 (LIVE IN-PERSON)

INFLUENCE MARKETING: The Open Brand Model

Students need to come to this session having prepared in small groups of 3 students: following the methodology proposed by the Professor, analyse the social media presence and reach of a brand of your choice. This exercise is inspired by the OPEN Brand concept.

This session will be dedicated to the Class presentation of your chosen brand based on the OPEN Model, to your peers in class your findings, benchmarking in the same category two other brands (remember groups of 3 students).

Class discussion

Article: The Uninvited Brand (HBS BH429-PDF-ENG)

Book Chapters: Gary Graham et al. "Content is king: news media management in the digital age" (See Bibliography)

SESSION 8 (LIVE IN-PERSON)

Sustainability Topics:

- Environment
- Governance
- Economic Development

CONTENT STRATEGY AND CONTENT MANAGEMENT .> SOCIAL MEDIA MARKETING FOR BUSINESS / REPUTATION MANAGEMENT

- The Loewe Business case study.
- Reading previous to session: The uninvited Brand.

Activity:

- *Discussions and learnings.*

Article: What is influencer marketing: How to develop your strategy (Sprout Social; September 17, 2020)

Book Chapters: Kelly Mooney and Nita Rollins, "The open brand: when push comes to pull in a web-made world" (See Bibliography)

Article: The Uninvited Brand (HBS BH429-PDF-ENG)

SESSION 9 (ASYNCHRONOUS)

USER EXPERIENCE SITES ANALYSIS AND BENCHMARK

Activity (in groups) : You will be given a chosen Company, and a brief to analyse their site from a User perspective.

THE IDEA IS TO UNDERSTAND AND LEARN BOTH FROM BEST PRACTICES AND MISTAKES¡, and present in Session 10 the do's and don't and your findings, o**nce benchmarked other comparable in the same sector brands**...

SESSION 10 (LIVE IN-PERSON)

USER EXPERIENCE / WEB USABILITY

Present (per group) to your peers in class your User Experience cases findings, benchmarking in the same category two other brands

Activity:

- *Groups presentations.*
- *Discussions and learnings.*

Reference Book:

Book Chapters: Steve Krug. "Don't Make Me Think" (See Bibliography)

SESSION 11 (LIVE IN-PERSON)

UX (User Experience)

Activity:

- *Professor Lecture.*
- *Discussions and learnings.*

SESSION 12 (ASYNCHRONOUS)

INBOUND MARKETING case / Forum

Activity:

- *Forum activity by subgroups of 3 students.*

Practical Case: HubSpot: Inbound Marketing and Web 2.0 (HBS 509049-PDF-ENG)
Article: 5 Companies with Inbound marketing that work (Mashable; September 13, 2012)
Other / Complementary Documentation: HubSpot Case Studies
Technical note: State of Marketing Trends Report 2022 (Hubspot)

SESSION 13 (LIVE IN-PERSON)

INBOUND MARKETING

- Lecture Inbound Marketing.
- Discussions and learnings.

Activity:

- *Forum Activity (in groups): debrief Hubspot case Discussion.*

Article: How to Create Detailed Buyer Personas for Your Business (Hubspot)

SESSION 14 (LIVE IN-PERSON)

INBOUND MARKETING

Activity:

- *Discussions and learnings.*
- *Course to date review.*

SESSION 15 (LIVE IN-PERSON)

MID TERM EXAM: multiple choice questions and automated responses quizz.

SESSION 16 (LIVE IN-PERSON)

DIGITAL MKG (1ST PART) Final project presentation.

Activity: Students will be asked to pitch their work on the Group Project so that the professor can give his/her feedback in class. Instructions of what needs to be delivered will be given by the professor in the first session. This also counts towards your Individual Grade.

Presentation / Discussion / Peer evaluation.

SESSION 17 (LIVE IN-PERSON)

SEARCH ENGINES.

Lecture/Discussion Search Engine Optimization (SEO)

Activity:

- *Discussions and learnings:*

Book Chapters: Chris Anderson, "The Long Tail" (See Bibliography)
Book Chapters: The Google Story: For Google's 10th Birthday (See Bibliography)
Technical note: Search Engine Optimization (SEO) (HBS IES421-PDF-ENG)

SESSION 18 (ASYNCHRONOUS)

SEARCH ENGINES.

Activity (individual): Go through the Google training programme /Hubspot Fundamentals... take the course... and get the Certificate, that once uploaded will doublecheck and you can get granted +0,5 pts

Activity (group):

1. *work in your Final project building adwords campaigns,*
2. *explore: GOOGLE ADWORDS / SEARCH / UBBERSUGGEST.*

SESSION 19 (LIVE IN-PERSON)

DIGITAL BUSINESS MODELS /ECOMMERCE models and patterns

Activity:

- *Discussions.*

Book Chapters: Chris Anderson, "The Long Tail" (See Bibliography)
Practical Case: Marketing Reading: Digital Marketing (HBS 8224-PDF-ENG)

SESSION 20 (LIVE IN-PERSON)

Sustainability Topics:

- Environment

ECOMMERCE

Activity:

   - *Lecture/Discussion.*

Technical note & tutorials: The Customer Journey (MKS020215-U-ENG-VID)

SESSION 21 (LIVE IN-PERSON)

MOBILE / MOBILE COMMERCE (MCOMMERCE)

Activity:

   - *Lecture/Discussion.*

Technical note & tutorials: Digital Marketing: Social Media and Mobile Marketing (MKS020091-U-ENG-HTM)

SESSION 22 (LIVE IN-PERSON)

Activity (in groups): *Groups workshop in class: Prepare your final project ecommerce new site, starting with wireframing.*

SESSION 23 (LIVE IN-PERSON)

EMERGING DIGITAL TECHNOLOGIES

Discussions.

SESSION 24 (LIVE IN-PERSON)

MOBILE & APPS

Activity:

   - *Discussions.*

Practical Case: Marketing Reading: Digital Marketing (HBS 8224-PDF-ENG)

SESSION 25 (LIVE IN-PERSON)

Sustainability Topics:

- Environment

METRICS / STORYTELLING / DASHBOARD

Technical note & tutorials: KPIs (MKS020204-U-ENG-VID)

Technical note & tutorials: Five Alternate Uses for an ROI Analysis (ENT020205-U-ENG-VID)

Technical note & tutorials: Dashboards and Storytelling: Interview with Christina Stathopoulos (Data Analyst, Google) (QME020092-U-ENG-VID)

SESSION 26 (LIVE IN-PERSON)

VIRTUAL IMMERSIVE EXPERIENCE (depending onthe Learning Innovation department availability) / THE DIGITAL TWIN concept

Metaverse immersion / IoT digital twin is a digital representation of a real-world entity, such as a device or a manufacturing production process. With Software solutions, you can build an IoT digital twin for any purpose. And there's no limit to the devices or systems you can connect.

Why IoT is considered as one of the key enablers of digital twins? Clearly, the explosion of IoT sensors is part of what makes digital twins possible. And as IoT devices are refined, digital-twin scenarios can include smaller and less complex objects, giving additional benefits to companies. Digital twins can be used to predict different outcomes based on variable data.

Activity:

- *Discussions and learnings.*

Technical note & tutorials: Using the metaverse in business (IST020362-U-ENG-VID)

SESSION 27 (ASYNCHRONOUS)

WORKING SESSIONS WITH PROFESSOR / DIGITAL MARKETING final project

Working session with each team (scheduled team by team. 10 minutes per team) to guide and support for final presentation.

SESSION 28 (LIVE IN-PERSON)

GROUPS PROJECTS FINAL PRESENTATIONS: "DIGITAL MARKETING and ANALYTICS" FINAL COURSE PROJECT

This is the main project for this course and a very important part of the course. Presentations constitute an oral exam and attendance is compulsory. Presentations need to be uploaded on the Blackboard no later than17pm the day before the presentation (exact date and time TBC during the introduction of the project). Failure to attend will result in forfeiting this part of the grade. Thus, no absences will be accepted unless for a justified medical reason.

SESSION 29 (LIVE IN-PERSON)

GROUPS PROJECTS FINAL PRESENTATIONS: "DIGITAL MARKETING and ANALYTICS" FINAL COURSE PROJECT

This is the main project for this course and a very important part of the course. Presentations constitute an oral exam and attendance is compulsory. Presentations need to be uploaded on the Blackboard no later than17pm the day before the presentation (exact date and time TBC during the introduction of the project). Failure to attend will result in forfeiting this part of the grade. Thus, no absences will be accepted unless for a justified medical reason.

SESSION 30 (LIVE IN-PERSON)

FINAL SEMESTER "DIGITAL MARKETING and ANALYTICS" COURSE EXAM. A blend of MCQ and open / essay questions

The final exam will cover all topics discussed during the entire course. It will last 1hr 20 min. The date of the Final Exam will be indicated in the first session. Punctuality is compulsory and no student will be allowed into the session once the exam has started.

EVALUATION CRITERIA

Students final grade will be based on both individual and group work of different characteristics that will be weighted in the below detailed structure.

Should a student not participate in its group activities, the Professor and the group members will decide which indivudual grade to grant.

criteria	percentage	Learning Objectives	Comments

Final Course Exam	25 %		Minimum grade to pass: 5 out of 10
Midterm Exam	15 %		Minimum grade to pass: 5 out of 10
Individual assignment/3 students subgrps	10 %		
Peer Evaluation (average of group team mates evaluation)ther	5 %		
Group Topics Research Presentation	15 %		50% Report, 50% Presentation,
Group Digital Marketing Project (split 50%/50%) Presentation	20 %		50% Report, 50% Presentation,
Class Participation	10 %		see detailed A) class participation

RE-SIT / RE-TAKE POLICY
A. CLASS PARTICIPATION

Please find here after the main criteria that will be used in reaching judgment about your class participation:

- Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.
- Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.
- Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.
- Discovery: Given the nature of the subject, positive value will always be found in the contributions that point out new content, tools, topics or other relevant information that has not been covered due to its novelty. Timing and adequacy of the intervention are of course essential qualifiers for the evaluation of the contribution.

B.   INDIVIDUAL ASSIGNMENTS

Each student must complete the assignments that the Professor will require. For each of them, there is an upper limit of two text pages (assuming 11-point font size, Times New Roman, double spacing) plus no more than one page of exhibits. Alternative format could also be power point. A digital copy of the document must be submitted to the professor via e-mail before the next session. In the case the assignment is not delivered on time , the grade wll be a "0".

Make sure the case write-up is easy to read. Consider using bullets, headings, etc., to make the case write-up easy to follow.

The objective of this process is to give you practice writing concise executive summaries – something that would make the reader believe that you have done a thorough analysis supporting your recommendations. This is the type of briefing that must typically be prepared for senior management – before they provide the resources for a more detailed research .

Good case briefs are concise, but also provide a fact-based rationale for your recommendations and implementation plan. The rationale should reflect a good understanding of the important issues of the case and may integrate previous material from the class or your experience. You might also note factors that argue against your recommendation, and how your implementation plan might minimize the impact of these factors.

C.   GROUP TOPICS PRESENTATION AND DOCUMENTATION

Each team will be assigned a different topic at the beginning of the course and the whole team will be responsible for presenting that topic findings and case to the class and to moderate the discussion of that case. Any no presentation on time will generate a "0". The objective of such exercise is to foster students research in a certain field, develop synthesis capacities and the ability to present in a convincing way to the rest of the group. In case a student does not participate in the group work, once doublechecked the group members version, the Professor might decide to grant a zero or a different grade than the rest of the group in line with the work participation and presentation quality. No attendance will equal to a "0"

D.   GROUP WORK PRESENTATIONS AND PAPER REPORT

Group Work Presentations and doc consist of developing a digital marketing plan of a start up, business, app or any offline business migrated to digital. That digitization marketing plan will be developed in 2 parts and presented to the group. For both the group work and its presentation and report, you are expected to complete a final project with your group and present it in written form. The objective is twofold: firstly to develop your skills working in group, and secondly the project that you will have chosen with your peers will give you the opportunity to reflect on what you have learnt in class and apply it to some practical problems. More details of the project will be provided by the start of the course.In case a student does not participate in the group work, once doublechecked the group members version, the Professor might decide to grant a zero or a different grade than the rest of the group in line with the work participation and presentation quality. No attendance will equal to a "0"

E.   MID TERM AND FINAL EXAMS

The midterm is designed to provide, both to the student and the professor, and idea of the level of understanding of the materials covered up to that session. It will be written in form, and it will include both multiple-choice and open questions. No attendance to exam will generate a "0".

The final exam is similar in format to the mid-term exam and covers all topics discussed during the entire course.A minimum 5 grade is required in each of these exams to pass. No attendance will equal to a "0"

The objective here is is to make sure that the student is able to display the level of understanding of the different topics of the subject, as well as the ability to apply digital reasoning to a business situation.

F.   PEER EVALUATION

The presence of "free riders" in teams is a problem that needs to be taken very seriously. The willingness and ability to work in teams is highly regarded in this class. Teams are responsible for their internal management, and teammates will be asked to provide a written evaluation of their peers. Both the Case presentations and the Marketing Plan Project are important team efforts with a considerable weight in the overall grading of this class. I therefore expect all members of all teams to collaborate and work diligently to achieve the best possible results. Therefore each group will be tasked to evaluate each peer, and the average of team mates evaluation will be the final grade that will be weigted. In case a student does not participate in the group work, once doublechecked the group members version, the Professor might decide to grant a zero or a different grade than the rest of the group in line with the work participation and presentation quality.

G.   RE-SIT / RE-TAKE POLICY:

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July. Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0). After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session. !

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects. !

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

- Chris Anderson. *The Long Tail.* Revised edition (July 8, 2008). Hachette Books. ISBN 1401309666 (Printed)
- Jeremy Preace. *Social Media Marketing for Business 2020.* (April 30th, 2020). Independently published. ISBN 9798642143643 (Printed)
- Andrew Macarthy. *500 Social Media Marketing Tips: Essential Advice, Hints and Strategy for Business: FACEBOOK, TWIT.* self. ISBN 9781792796036 (Printed)
- Steve Krug. *Don't Make Me Think, Revisited: A Common Sense Approach to Web and Mobile Usability.* Addison Wesley. ISBN 0321965515 (Digital)
- Gary Graham et al. (2015). *Content is king: news media management in the digital age.* Bloomsbury Publishing. ISBN 9781623567507 (Digital)
- Kelly Mooney and Nita Rollins. (2008). *The open brand: when push comes to pull in a web-made world.* New Rider Press. ISBN 9780321550255 (Digital)
- Rick Levine and Doc Searls. (2011). *The cluetrain manifesto.* Basic Books. ISBN 0465024092 (Digital)
- David A Vise and Mark Malseed. (2008). *The Google Story: For Google's 10th Birthday.* Delacorte Press. ISBN B006G85FBO (Digital)

BEHAVIOR RULES

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DIGITAL OPERATIONS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 DO-NBA.1C.d.OPT.M.A

Area Information Systems and Technology

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **SOLEDAD LLORENTE CANCHO**

E-mail: sllorente@faculty.ie.edu

Transformation Coach and Innovation Advisor | Professor

Connector and Driver of change. Passionate about breaking limits through Purpose and People, going beyond new technologies.

Experienced professional in Innovation, Operations and Digital Transformation. Soledad has built 20+ years of long-term growth, transformation and operational excellence in multiple countries and cultures working for leading organisations such as L'Oréal, Danone, Zara, Banco Santander, HP, Boston Scientific, Siemens Energy, Visa...

She evolves teams' mindsets from linear to exponential, exercising the internal innovation muscle and developing new and unexpected business opportunities through new products, services and value chain digitalization/improvement.

Se is mother of 4, her purpose: "Acquire, amplify and share the mindset to make a better future happen"

Academic background

- Harvard Kennedy School - Workshop in Global Leadership
- Massachusetts Institute of Technology - Sloan School of Management - Innovation, entrepreneurship and leadership Program.
- Executive MBA, IE Business School (Lidera for Women scholarship).
- Major in Eco-industries, Ecole Nationale Superieure des Mines, France.
- Major in Engineering, Universidad Politécnica, Madrid.

Academic experience

- Mentor of young entrepreneurs at Area31, the hub of entrepreneurial activity at IE and the home of its center for Entrepreneurship and Innovation.
- She learns while teaching at IE Business School and IE University (from C level to undergraduate).
- Contributor to the books: "Exponential Transformation- the Playbook to Evolve Your

Organization to Navigate Industry Disruption and Change the World for the Better"(2019) and "Positive Impact" (2022).

Corporate Experience

- Innovation and Transformation Coach (Rassini, Visa, HP printing division, Banco Santander, Boston Scientific, Simply Natural farms, Banesco/Abanca, Colgate, HP healthcare,Ingram Micro, HP 3D printing, Siemens Energy, ...)
- New Operations at Zara.com at Inditex headquarters, Arteixo, Spain.
- Operations Director, Danone, baby food headquarters, Amsterdam, Netherlands.
- Supply Chain Unit Manager, L'Oréal, Luxury goods factory, Madrid, Spain.
- Logistic Manager, L'Oréal, luxury goods headquarters, Paris, France.
- Production Manager, L'Oréal, mass market factory, Paris, France
- Consultant IT and Systems, Paris, France.

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PREREQUISITES

No needed.

SUBJECT DESCRIPTION

The signs and impacts of new technology disruptions are speeding up. Disruptive technologies and innovation are changing the way we live work and relate to one another.
New studies show how current crises (such as COVID-19, international conflicts, global Supply chain, Global warming...) are accelerating digital transformation and pushing our society and every industry over the technology tipping point.

In contrast the potential of the Industry 4.0, or the revolution that new technologies bring, is still far from being realized. Many companies are struggling to make the vision of digitized operations a reality.

What is Digital Operations transformation? It is the revolution of companies through advanced digital technologies to drive new levels of efficiencies, customer experiences and sustainability.

The race for digital operations transformation will create winners out of companies that performed it and losers out of those that didn't. Where do you stand?

In this elective course, we will:

- Align digital operations and strategy for improved performance,
- Evaluate how technologies are being applied to digitally transform operations and Supply Chain management and optimize the speed and scale of processes, enable strategic operations and increase sustainability.
- Learn by doing, working on real and on-going business cases, analysing its operations and identify opportunities for digital transformation and efficiency improvements.

LEARNING OBJECTIVES

- To get a better professional and personal awareness of the disruption impacting every industry and its operations "Technological affinity".
- To gain a transformative mind-set trough digital operation, the back bone of any digital transformation.
- To practice, How to have a 10 times more effective Value Chain. "Learning by doing".
- To excel and lead your learning experience. "We can teach and lead, only if we are willing to learn"

To reach the course objectives most effectively, you will need to:

- Read, discuss and analyse the material of each session,
- Be prepared and participate in class discussions, maximize your own learning and in consequence the entire class learning.
- Prepare this course deliverables.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10.0 hours
Discussions	26.67 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	26.67 %	20.0 hours
Group work	26.67 %	20.0 hours
Individual studying	6.67 %	5.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

INTRODUCTION I – The 4th Industrial Revolution

We are in the early stages of the 4th Industrial Revolution, led by the emergence and convergence of new digital technologies, and characterized by the concepts of exponentiality and disruption.

This 4th Industrial Revolution is questioning the economic, social and operating models that have served us up to now, making many of them obsolete and fundamentally changing the way we live, work and interact.

Today, the greatest challenge lies in generating and developing this new exponential way of thinking and be prepared to transform current operating models into digital ones leveraging new technologies to succeed.

Questions:

- What are the impacts caused by the 4th industrial revolution?
- What are the new digital operational models that are emerging as a result of this impact?
  Session structure:
- Welcome & Introduction to the course
- Why this course - Awake - The 4th Industrial Revolution - How this Course

Technical note & tutorials: The Story of the Fourth Industrial Revolution (IST020107-U-ENG-VID)

SESSIONS 3 - 4 (LIVE IN-PERSON)

INTRODUCTION II - The ingredients to successfully operate in the 4th Industrial Revolution

Innovation methods and tools, a simple way to modernize and improve existing business process or introduce and thrive with totally new ones.

Questions:

- What are the companies that have experienced exponential growth?
- What are the common elements in their different operational models to success and achieve exponential growth?
- Which methodologies and frameworks can be applied to innovate?

Session structure:

- Digital innovation and disruption.
- Exponential growth in the Digital Transformation era, the key elements to succeed. - New Innovation methodologies and processes.

Technical note & tutorials: Exponential Growth Models (IST020121-U-ENG-VID)

SESSION 5 (ASYNCHRONOUS)

Online Discussion Forum.

- We will discuss on Campus interactive questions and short exercises around S6 and S7 cases.
- The discussion forum will be active during 24 hours (+ Recap & learnings) and used by the leading team to help other students to prepare next sesions cases.

SESSIONS 6 - 7 (LIVE IN-PERSON)

SESSION 6

A complex operations and tech infrastructure (Domino's Pizza).

Managing tech operations, particularly in the context of companies outside the traditional tech sector.

A digital strategy with consistent coordination and implementation across thousands of individual stores with hundreds of different franchise owners.

Adoption of new tech products throughout a large organization with many stakeholders.

Questions

- What were the challenges that Domino's faced at the beginning of the case (2008)?
- What are the most important dynamics within the QSR industry?
- How competitive is the pizza restaurant industry?
- What did Domino's do to turn around its performance? What was the order they did things in? Is there a certain sequencing they followed? Please be specific.

- What were the company's most significant innovations?
- What are the challenges and opportunities that Domino's faces at the end of the case (2021)?
- What should Domino's focus on next? Future

SESSION 7

Digital Supply Chain Management.

End-to-end (process) management on information creation, production, distribution and consumption. And the impact of digitalization on the restructuring of information chains through:

- the lowering of marginal costs of production, transportation, and storage;
- the shift of network effects from supply to demand;
- convergence.

Questions/Discussion:

- Map the movie information chain, from content creation to the customer. What were the key distribution channels before the rise of the internet and what are they today? In which stages of the information chain is Disney present? How has Netflix evolved over the years?
- What are the strengths and weaknesses of Disney's business model? What are the opportunities and threats of the movie production industry?
- Should Disney offer its own streaming services? Why or why not? If so, how should it implement this service: grow organically or acquire content? Make the content exclusive or license it to other streaming services?
- What is Disney's alternative growth options?

Practical Case: Tech with a Side of Pizza: How Dominos Rose to the Top (HBS 421057-PDF-ENG)
Technical note: Disney and 21st Century Fox: Reshaping Disney's Strategy for the Digital Age (HBS IN1528-PDF-ENG)

SESSION 8 (ASYNCHRONOUS)

Online Discussion Forum.

- We will discuss on Campus interactive questions and short exercises around S9 case.
- The discussion forum will be active during 24 hours (+ Recap & learnings) and used by the leading team to help other students to prepare next sesions cases.

SESSIONS 9 - 10 (LIVE IN-PERSON)

SESSION 9

Tech Fashion industry

Fashion has always been at the forefront of innovation — from the invention of the sewing machine to the rise of e-commerce. Like tech, fashion is forward-looking and cyclical. Estimated to be worth more than $3T by the end of the decade (according to CB Insights), the fashion sector is also one of the largest industries in the world.

In this session we will take a look at the evolution of the new digital value chain in the fashion industry and where technology is taking it next, from Product Design to Retail and beyond. Question:

- How are our clothes and accessories designed, manufactured, distributed, and marketed?
- How can new digital technologies improve Fashion end to end Value Chain?

SESSION 10

Understanding Digital Operations in the fast fashion #1 retailer. "Zara, its secret ingredient", material provides by the professor.

Article: The Future of Fashion: From design to merchandising, How Tech is reshaping the Industry (cbinsights.com)

SESSIONS 11 - 12 (LIVE IN-PERSON)

Understanding Digital Operations in the store.

From a real case to a real practice. Let´s go to Zara´s biggest store in the world...a digital store.

- Zara individual assignment (you can do it by pairs if you prefer)
- The individual work covers a maximum of 3 pages written, answering questions that professor will provide in class. How a Digital store may be a key element to assure the strategic objectives.

SESSION 13 (ASYNCHRONOUS)

Online Discussion Forum.

- We will discuss on Campus interactive questions around S14 and S15, Final Case and exercise.
- The discussion forum will be active during 24 hours (+ Recap & learnings) and used by the professor to help other students to prepare next sesions cases.

SESSIONS 14 - 15 (LIVE IN-PERSON)

"Moderna case" explores how biotechnology (biotech) company Moderna applied artificial intelligence (AI) and digitization to expedite the drug therapy development process, including for vaccines.

Moderna's operational infrastructure, also known as an AI factory, enabled it to rapidly build and test potential vaccine and other therapeutic models, shortening what was typically a years- long experimentation process to several months.

This case illustrates how Digital operations drive innovation and improve business outputs in a traditional and highly regulated industry (Pharma). It is a perfect example that is relevant to the future of any firm across any industry.

Practical Case: Moderna (A) (HBS 621032-PDF-ENG)

EVALUATION CRITERIA

Evaluation of your performance will be based on class participation, individual work, and group assignments, weighted as follows:

- Individual class participation will be evaluated based upon whether a contribution substantially enriches the discussion. I will take notes after classes to points on these criteria, you will asses your team members and other class mates when you are the leading team.
- The individual work covers a maximum of 3 pages written of an individual report about the learning from the Digital store visit, to be prepared after the Session. You can do it by pairs.
- Groups presentations, there will be groups appointed to present their solutions on certain cases and lead those sessions. More details will be shared during the course.
- Final Case is a practical assignement where students must through Moderna case and show

their leranings from this course.
More detailed guidelines will be shared and explained in class.

criteria	percentage	Learning Objectives	Comments
Final case	30 %		Final group presentation
Individual Work	25 %		Written report of SC Simulation
Group Presentation	25 %		Case Presentation
Class Participation	20 %		individual weekly participation

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July. Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls(ordinary and extraordinary) for that Academic Year and have to re-takethe course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sitevaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable"in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rdcall) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- ! Students failing more than 18 ECTS creditsafter the June/July re-sits will be asked to leave

the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- ! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re- taker, and pay the corresponding tuition fees. As you know, students have a total

CLASS ATTENDANCE

For In-Person programs, students should attend their live in-person sessions on campus.

As per the IE University policy, bachelor students must attend at least 70% of sessions. This policy applies to any type of session: live in-person sessions on campus, asynchronous sessions, or remotely online as planned in the syllabus. Students attending less than 70% of sessions will be graded with a FAIL for the course. For Bachelor-degree programs, this fail will apply to the ordinary and extraordinary calls of the current academic year. For Master-degree programs, students must obtain a Low Pass in the subject ?s retake or otherwise they will face program expulsion.

Attendance to asynchronous sessions will be monitored by the professor and will count in the same way as synchronous sessions. As asynchronous sessions involve students' activities, the professor will monitor these activities to record their attendance.

Under exceptional circumstances (such as serious health problems, visa delays, and travel restrictions), a student could ask for a temporary attendance waiver. A written and documented request must be made in advance to the Program Management Team. Last minute changes in attendance or verbal requests will not be considered. If the request is approved, an attendance waiver will be granted over one or more sessions and the allowed 30% will be applied to the remaining sessions.

Personal trips, appointments, minor illnesses, family celebrations, or other personal matters will not be treated as an exceptional case and should be considered part of the 30% of allowed absences.

Professors will be informed by Program Management of all exceptional cases. Under no circumstances will faculty members have the responsibility/power to justify a student's absence. As a general rule, Professors and Program Management shouldn't contemplate the design of make-up activities for any type of absence.

Although students without attendance waiver can attend the session remotely online, they will be considered as absent. This absence will negatively affect their attendance % as well as their participation grade.

BEHAVIOR RULES

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GENDER EQUALITY AND SUSTAINABLE DEVELOPMENT

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 GESD-NBA.1C.n.OPT.M.A

Area Economics

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **CAROLINA FERRER RINCON**

E-mail: cferrerr@faculty.ie.edu

Carolina Ferrer works as an Adjunct professor at the IE School of Global and Public Affairs teaching courses in the areas of Gender Equality and Sustainable Development, Foreign Aid, Social entrepreneurship and Project Management in Undergraduate and Masters ? programs. She is also enrolled in the Thesis supervisors and Academic Advisors Programs at IE. Carolina has been working at the World Bank since 2011 in the analysis and implementation of development projects mainly in the area of Gender Equality and Development in Latin America and the Caribbean, as well as in Africa. After completing her Master's degree in International Relations, Carolina worked in other organizations, such as the Council of the EU, The German Marshall Fund of the US, and the Inter- American Development Bank. She has also worked at the Permanent Representation of Spain to the EU and the Permanent Mission of Spain to the United Nations in Diplomatic, Institutional and Public policy issues.

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Professor: **PATRICIA GABALDON QUIÑONES**

E-mail: pgabaldon@faculty.ie.edu

Patricia Gabaldon is the Director of the Bachelor in Econmics, ViceDean of Pedagogical Innovation at the IE School of Global and Public Affairs, and Associate Professor of Economic Environment at IE Business School in Madrid (Spain). Patricia Gabaldon received her PhD in Economics from the University of Alcala, Spain. As an economics professor, she combines theory and practice to understand real life issues, from an applied economic perspective. Professor of economics at IE since 2008, her research interests focus on the role of women in the economy, corporate governance, and public policies regarding women on boards and female entrepreneurs. She has collaborated with multilateral organizations in gender equality topics.

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PREREQUISITES

there are no pre-requisites for this course.

SUBJECT DESCRIPTION

This Course will provide students with a general introduction to Gender Equality which have been for the past few years at the forefront of the global agenda to achieve sustainable development. As the World Development Report 2012 "Gender Equality and Development" stated, progress and persistence in gender equality matter, because gender equality is a core development objective in its own right but it is also "smart economics", enhancing productivity and improving other development outcomes, including prospects for the next generation and for the quality of societal policies and institutions.

We will analyze the conceptual framework proposed in the WDR 2012 report and will further investigate the relevant dimensions identified of gender equality such as endowments, economic opportunities and agency and how they impact in the economic and social development of countries. We will also work together, through real examples, in understanding the relevant aspects of gender equality such as the barriers and enablers of female leadership and female entrepreneurship, as well as the policies that companies and governments are implementing to break those barriers and to enhance gender equality.

LEARNING OBJECTIVES

By the end of this course, students will have a wide and relevant knowledge of what gender equality means and why it is important for individual, families, societies, countries, governments and businesses, among others. Students will also understand that it is an essential aspect to achieve sustainable development and economic growth in the countries that cannot be longer ignored.

Furthermore, this course will equip students with the practical skills and tools to effectively mainstreaming gender while planning and implementing public policies and corporate policies. Finally, by acquiring these skills, students will be able to identify in the future gender inequalities and gaps in their respective professional fields and address them using the adequate strategies and mechanisms.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	40.0 %	30.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	13.33 %	10.0 hours
Individual studying	13.33 %	10.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to Gender Equality and Sustainable Development I

Article: World Development Report (WDR) 2012: Gender Equality and Development. Overview, Chapter 1. (The World Bank, 2011)

Article: SDG 5: Achieve gender equality and empower all women and girls (UN Women)

Article: The Global Gender Gap report 2020. Chapter 1. (World Economic Forum)

Article: CEDAW, 1979 (UN Women) (Recommended) (Optional)

Article: Beijing Platform for Action, 1995. (World Conference on Women) (Recommended) (Optional)

Article: World Survey on the role of women in development 2014. Gender Equality and Sustainable Development". Chapter 2. (UN Women 2014) (Recommended) (Optional)

Article: Why Gender Equality is the most critical of all the global goals. (The Huffington Post, 2015) (Recommended) (Optional)

SESSION 2 (LIVE IN-PERSON)

Introduction to Gender Equality and Sustainable Development II

Article: World Development Report (WDR) 2012: Gender Equality and Development. Overview, Chapter 1. (The World Bank, 2011)

Article: SDG 5: Achieve gender equality and empower all women and girls (UN Women)
Article: The Global Gender Gap report 2020. Chapter 1. (World Economic Forum)
Article: CEDAW, 1979 (UN Women) (Recommended) (Optional)
Article: Beijing Platform for Action, 1995. (World Conference on Women) (Recommended) (Optional)
Article: World Survey on the role of women in development 2014. Gender Equality and Sustainable Development". Chapter 2. (UN Women 2014) (Recommended) (Optional)
Article: Why Gender Equality is the most critical of all the global goals. (The Huffington Post, 2015) (Recommended) (Optional)

SESSION 3 (LIVE IN-PERSON)

The WDR 2012 Conceptual Framework and its application

Article: World Development Report 2012: Gender Equality and Development. Chapter 2. (The World Bank, 2011)
Article: Why longer paternity leave is a step forward for gender equality (World Economic Forum 2019)
Article: Want gender equality? Then fight for fathers' rights to shared parental leave (The Guardian, 2019) (Recommended) (Optional)

SESSION 4 (LIVE IN-PERSON)

Endowments: Gender Equality in Education and Health

Technical note: "World Development Report 2012: Gender Equality and Development". Chapter 3: Education and Health: Where do gender differences really matter? (The World Bank, 2011)
Article: "Unequal, Unfair, Ineffective and Inefficient Gender Inequity in Health: Why it exists and how we can change it". Chapter 3: Differences in Exposure and Vulnerability (WHO 2007)
Technical note: "World Development Report 2018: LEARNING to Realize Education's Promise. Chapter 2. (The World Bank 2017)
Technical note: "Missed Opportunities. The High Cost of Not Educating Girls" (The World Bank, 2018) (Recommended) (Optional)

SESSION 5 (LIVE IN-PERSON)

Economic Opportunities: Gender Equality in the Private Sector

Article: "Women in Business and Management, Gaining Momentum. Global Report" (International Labour Organization, 2015)
Technical note: "Sheryl Sandberg: When Women Get Stuck, Corporate America Gets Stuck" (The Wall Street Journal, September 30th 2015.)
Article: "Myths and Facts about Female Directors" (IFC, Rene Adams 2015) (Recommended) (Optional)
Article: The Wall Street Journal, September 30th 2015. "What's Holding Women Back in the Workplace?" (The Wall Street Journal, September 30, 2015) (Optional)
Article: "The CS Gender 3000 report. Women in Senior Management" (Credit Suisse, 2014) (Recommended) (Optional)

SESSION 6 (LIVE IN-PERSON)

Economic Opportunities: Female Entrepreneurs, Access to Finance and Microcredits

Article: "Investing in Women ́s Employment, Good for Business, Good for Development".
(International Finance Corporation, 2013.)
Podcast: Investing in Women: New evidence for the Business Case. (IFC, (2017)
Article: . Access to Finance, Mind the Gender Gap. (EBRD)
Article: Access to Finance: Why Aren't Women Leaning In. (IMF)
Multimedia Material: What is Microcredit (Grameen Bank)
Article: A Grameen Bank concept: Micro-credit and poverty alleviation program in Bangladesh.
(International Conference on Emerging Trends in Computer and Image)
Article: "Women-Owned SMEs: A Business Opportunity for Financial Institutions. A Market and
Credit Gap Assessment and IFC ́s Portfolio Gender Baseline". (International Finance Corporation,
2014) (Recommended) (Optional)
Article: "Strengthening Access to Finance for Women-Owned SMEs in Developing Countries".
(Global Partnership for Financial Inclusion and International Finance Corporation, 2011)
(Recommended) (Optional)
Article: "Social Entrepreneurship Amongst Women and Men in the United States". (National
Women ́s Business Council) (Recommended) (Optional)
Technical note: Global Findex Database. (The World Bank Group.)

SESSION 7 (LIVE IN-PERSON)

Economic Opportunities:Time Use, Employment, Labor Protection and Unpaid Work
Compulsory readings:

Article: Unrealized Potential: The High Cost of Gender Inequality in Earnings.The Cost of Gender
Inequality Notes Series. Washington, DC. (The World Bank)
Article: The UN Women Gender and Economics Training Manual (UN Women)
Article: Investing in Women. New Evidence for the Business Case. (IFC, 2017.)

SESSION 8 (LIVE IN-PERSON)

Economic Opportunities: Access to Finance, Microcredits

Article: EBRD. Access to Finance, Mind the Gender Gap. (Eurpean Bank)
Article: Access to Finance: Why Aren't Women Leaning In (IMF)
Article: What is Microcredit (Grameen Bank)
Article: A Grameen Bank concept: Micro-credit and poverty alleviation program in Bangladesh.
(International Conference on Emerging Trends in Computer and Image)
Article: Global Findex Database. (The World Bank Group) (Recommended) (Optional)

SESSION 9 (LIVE IN-PERSON)

Agency: Social Norms and Gender Stereotypes

Article: "World Development Report 2012: Gender Equality and Development". Chapter 4: Promoting
Women ́s Agency. (The World Bank, 2011)
Article: Social norms, gender norms and adolescent girls: a brief guide (ODI 2015)
Article: The World Bank Group, 2014. "Voice and Agency. Empowering women and girls for shared
prosperity". Chapters 1, 3 and 4 (Recommended) (Optional)
Article: "A 'Generationally Perpetuated' Pattern: Daughters Do More Chores" (The New York Times)

(Recommended) (Optional)

SESSION 10 (LIVE IN-PERSON)

Agency: Female Leadership in the Public Sector: Women in Politics
Compulsory Readings:

Article: Gender quotas and female leadership: A review. Background paper for the World Development (Openknowledge Worldbank)
Article: UN Women. Women in Politics Map 2020 (UN Women)
Article: Unfinished Business: Women, Men, Work, Family (The New York Times) (Recommended) (Optional)

SESSION 11 (LIVE IN-PERSON)

Introduction to Gender Mainstreaming and its application in development projects
Compulsory Readings:

Article: Gender Mainstreaming. An overview. Chapters 1 and 3. (Office of the Special Adviser on Gender Issues and Advancement of Women United Nations)
Article: What is Gender Mainstreaming? (European Institute for Gender Equality)

SESSION 12 (LIVE IN-PERSON)

Gender Mainstreaming in Public Policies
Compulsory readings:

Article: Toolkit for Mainstreaming and Implementing Gender Equality. Chapter 3 (OECD)

SESSION 13 (LIVE IN-PERSON)

Gender Mainstreaming in the corporate world
Compulsory readings:

Article: Gender Equality: A Smart Proposition for Business (MCC)
Article: Five Steps for Companies to Make Gender Equality Mainstream (BSR)
Article: Why Gender Equality Matters In Business Success. (Forbes)

SESSION 14 (LIVE IN-PERSON)

The impact of COVID-19 on Gender Equality
Compulsory readings:

Article: From Insights to Action. Gender Equality in the Wake of COVID-19 (UN Women)
Article: COVID-19 and gender equality: Countering the regressive effects" (Mckinsey & Company)
Technical note: COVID-19 has worsened gender inequality. These charts show what we can do about it (World Economic Forum)

SESSION 15 (LIVE IN-PERSON)

Final exam

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		
Mid term exam	30 %		
Class participation	20 %		

RE-SIT / RE-TAKE POLICY

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

As a result of IE's ´liquid learning´ model, all students must abide to the attendance policy for AY 2021-22 where physical (in-person) attendance to class is compulsory for all regular Face-to-Face courses. Those students who, due to exceptional cases (that have been pre-approved by IE), are connecting remotely to class sessions and not physically in the classroom are required to fully connect their camera and microphone at all times , and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Ø Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

Ø It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:
- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. The professor will advise the student on how to present said material. All written assignments have to be submitted through Turnitin, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the Academic Ethics Committee. Very high similarity scores will be automatically flagged and forwarded to the Academic Ethics Committee. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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HOW TO LEAD CHANGE AND PEOPLE TRANSFORMATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 HLCPT-NBA.1C.s.OPT.M.A

Area Human Resources and Organisational Behaviour

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MARGARITA MAYO CUELLAR**

E-mail: MMayo@faculty.ie.edu

MARGARITA MAYO CUELLAR

IE Professor of Leadership & Organizational Behavior

Margarita Mayo is one of IE Business School´s most influential thought leaders. Professor Margarita Mayo has made a name as an award-winning author and researcher. Her book, *Yours Truly: Staying Authentic in Leadership and Life* (Bloomsbury), won the Exceptional Book by a Woman award at the 2019 Business Book Awards in London.

Even before that, though, she was the recipient of the Fulbright Scholarship at Harvard University for her research on Leadership, Power and Influence, and the Center of Creative Leadership in the United States recognized her as a promising researcher. Most recently she was named to the prestigious Thinkers 50 Radar, a global ranking of management thinkers. The awards reflect an energetic pace of publication in important journals like *Harvard Business Review*, the *Journal of Applied Psychology*, *Academy of Management Journal*, *Academy of Management Learning & Education*, *Organizational Research Methods*, *Human Resource Management*, *Leadership Quarterly*, and the *Journal of Organizational Behavior*. She has published, with her students and collaborators, more than 60 scientific articles, and frequently writes for business press such as *Forbes*, *Financial Times*, *Economic Times*, *Expansión* and *Cinco Días*.

Ever since her arrival at IE in 2000, Mayo also stands out as one of IE's stellar professors. Her courses on Organizational Behavior, Leadership Development, Teambuilding and Coaching, Managing People and Leading with Purpose are taught across undergraduate and master programs—as well as in-company Executive Education programs– and have regularly earned her the Teaching Excellence Award.

Margarita Mayo holds a PhD in Management Psychology from State University of New York, a Masters in Psychology from Clark University, and a B.A. in Psychology from Universidad Autonoma in Madrid (Valedictorian). She has worked with companies and organizations such as Al Ghurair Group, Zegna, Endesa, Abu Dhabi Distribution Company, Performance Strategies, Celonis, ArcelorMittal, Intras, Moving Forward, TotalEnergies, Novartis, McKinsey, Everis, Making Science, and AT&T and international organizations such as United Nations, OECD, Africa Development Bank and World Knowledge Forum on issues relating to leadership development, executive coaching, 360 feedback and change management in Europe, Asia, the Middle East and United States.

More about her work can be found on the website: www.margaritamayo.com

Academic Background

PhD in Management Psychology, University of New York at Buffalo, USA
Fulbright Scholar, Harvard University, USA
MA in Social Psychology, Clark University, USA
BA in Psychology, Universidad Autónoma de Madrid, Spain

Academic Experience

Professor of Organisational Behaviour, IE Business School, 2000 to present
Visiting Professor at Lancaster Management School, Lancaster University, UK, 2009
Academic Director of the Centre for Diversity and Global Management, IE Business School, 2003-2009
Director of the PhD Programme, IE Business School, 2004
Assistant Professor of Business Administration, Richard Ivey School of Business, University of Western Ontario, USA, 1997 to 2000
Lecturer, Organisational Behaviour, University of New York at Buffalo, USA, 1994 to 1997

margarita.mayo@ie.edu

PREREQUISITES

SUBJECT DESCRIPTION

This course offers frameworks, knowledge and tools to help you be more effective leading change and people transformations in both your work and your personal life. You will learn concepts and tools to help you achieve your personal development goals and higher order purposes including understanding yourself and others, leading people for transformation, and managing change in crisis as well as opportunity scenarios understanding who is involve; how they are engaging; and what tools you need to be used to achieve change and transformation.

LEARNING OBJECTIVES

This course aims at providing you with an understanding as well as practical tools you can apply, regarding managing personal change and people and organizational transformation moving away from a traditional leadership style to adopt a transformational leadership style that elevates your own goals and motivatates others to develop and grow. Key concepts and frameworks will include self-awareness, transformational and authentic leadership, coaching and development, and change management.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	20.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	20.0 %	15.0 hours
Individual studying	20.0 %	15.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

PART 1: PERSONAL CHANGE

SESSION 1 (LIVE IN-PERSON)

Overview of course syllabus and requirements

Introduction to the course.

Technical note: Managing Your Career (HBS 494082-PDF-ENG)

SESSIONS 2 - 3 (LIVE IN-PERSON)

Self-awareness and Personal Change

Article: MANAGING ONESELF (HBS R0501K-PDF-ENG)

Practical Case: Mike Miller (A) (HBS 482061-PDF-ENG)

PART 2: PEOPLE TRANSFORMATION

SESSIONS 4 - 5 (LIVE IN-PERSON)

Transformational Leadership

You will complete an online leadership test about your prefered leadership style. You will receive instruction in due course. Your individual report will be given to you in class.

Practical Case: Wolfgang Keller at Konigsbrau-TAK (HBS 498045-PDF-ENG)
Technical note: What leaders Really do (HBS R011F-PDF-ENG)
Technical note: What Makes a Leader? (HBS R040H-PDF-ENG)

PART 3: ORGANIZATIONAL CHANGE

SESSIONS 6 - 7 (LIVE IN-PERSON)

Coaching and Development

Practical Case: Coaching for Exceptional Performance Workshop (TCC 9B00C006)
Practical Case: Coaching for Exceptional Performance Workshop - Marketing Supervisor Role: Chris Parkins (TCC 9B00C007)
Practical Case: Coaching for Exceptional Performance Workshop - Market Development Manager Role: Kim Hughes (TCC 9B00C008)
Practical Case: Coaching for Exceptional Performance Workshop - Engineering Manager Role: Robin Maynard (TCC 9B00C009)
Practical Case: Coaching for Exceptional Performance Workshop - Telesales Supervisor Role: Kelsey Scott (TCC 9B00C010)
Practical Case: Coaching for Exceptional Performance Workshop - Market Analyst Role: Pat Cox (TCC 9B00C011)
Practical Case: Coaching for Exceptional Performance Workshop - General Production Supervisor Role: Lee Sewell (TCC 9B00C012)
Practical Case: Coaching for Exceptional Performance Workshop - Project Sales and Marketing Manager Role: Jody Hickson (TCC 9B00C013)
Article: The Leader as Coach (HBS R1906G-PDF-ENG)

SESSIONS 8 - 9 (LIVE IN-PERSON)

Multimedia Material: BELBIN Self-Perception Questionnaire (BEL)
Practical Case: Carter Racing Part A & B (KEL)

SESSIONS 10 - 11 (LIVE IN-PERSON)

Change Management I
Assessment

Multimedia Material: ExperienceChange Simulation (EXP)
Practical Case: DRW Techologies (in-class reading) (HBS 916535-PDF-ENG)

SESSIONS 12 - 13 (LIVE IN-PERSON)

Change Management II

Planning & Implementation

Article: Leading Change: Why Transformation Efforts Fail (HBS R0701J-PDF-ENG)

Article: Inside GE´s Transformation (HBS R1705B-PDF-ENG)

Article: Cracking the Code of Change (HBS R00301-PDF-ENG)

Multimedia Material: Experience Change Simulation (EXP)

SESSION 14 (LIVE IN-PERSON)

Group Presentations

SESSION 15 (LIVE IN-PERSON)

Final Exam.

Multimedia Material: Change Management Simulation: Power and Influence V3 (HBS 7611-HTM-ENG)

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	30 %		
Individual Work	20 %		
Group Work	15 %		
Group Presentation	15 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

Class participation (individual): 20% of your grade. Class participation will be evaluated in face-to-face. Everyone is expected to be prepared for each class and to be an active participant in class discussion. You are required to attend each one of the classes. Your participation grade will reflect my assessment of your total contribution to the learning environment. This includes not only the frequency of your contributions but also their quality. Participations are evaluated according to the following standard.

0: You do not do any of the following:

1-5: You are present, on time, and concentrated in class.

6-10: You are participating and are part of the discussion.

11-15: You are greatly involved in participation, having more than one good point to make.

16-20: You participate with really high-quality points, helping advance the in-class discussion and sharpening the in-class debate.

Quality includes among other things: (1) sound, rigorous, insightful diagnosis (e.g. sharpening of key issues, depth, and relevant of the analysis), (2) ability to draw on course materials nd your own experience productively, (3) professionalism of your conduct (attendance, punctuality, preparedness, and showing respect to all section members and their class contributions.)

Group Projects (in groups): 30% of you grade: You need to form a Learning Team with 4-5 members within the first week of the semester. This group has two major tasks: (1) group presentation, and (2) group work

Personal Development Plan (individual): 20% of you grade.

Final Exam (individual): 30% of your grade: The final exam takes place at the end of the course and covers all topics and readings addressed in the course.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

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Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

! Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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HOW TO LEAD CHANGE AND PEOPLE TRANSFORMATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 HLCPT-NBA.1C.s.OPT.M.A

Area Human Resources and Organisational Behaviour

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MARGARITA MAYO CUELLAR**

E-mail: MMayo@faculty.ie.edu

MARGARITA MAYO CUELLAR

IE Professor of Leadership & Organizational Behavior

Margarita Mayo is one of IE Business School´s most influential thought leaders. Professor Margarita Mayo has made a name as an award-winning author and researcher. Her book, *Yours Truly: Staying Authentic in Leadership and Life* (Bloomsbury), won the Exceptional Book by a Woman award at the 2019 Business Book Awards in London.

Even before that, though, she was the recipient of the Fulbright Scholarship at Harvard University for her research on Leadership, Power and Influence, and the Center of Creative Leadership in the United States recognized her as a promising researcher. Most recently she was named to the prestigious Thinkers 50 Radar, a global ranking of management thinkers. The awards reflect an energetic pace of publication in important journals like *Harvard Business Review*, the *Journal of Applied Psychology*, *Academy of Management Journal*, *Academy of Management Learning & Education*, *Organizational Research Methods*, *Human Resource Management*, *Leadership Quarterly*, and the *Journal of Organizational Behavior*. She has published, with her students and collaborators, more than 60 scientific articles, and frequently writes for business press such as *Forbes*, *Financial Times*, *Economic Times*, *Expansión* and *Cinco Días*.

Ever since her arrival at IE in 2000, Mayo also stands out as one of IE's stellar professors. Her courses on Organizational Behavior, Leadership Development, Teambuilding and Coaching, Managing People and Leading with Purpose are taught across undergraduate and master programs—as well as in-company Executive Education programs– and have regularly earned her the Teaching Excellence Award.

Margarita Mayo holds a PhD in Management Psychology from State University of New York, a Masters in Psychology from Clark University, and a B.A. in Psychology from Universidad Autonoma in Madrid (Valedictorian). She has worked with companies and organizations such as Al Ghurair Group, Zegna, Endesa, Abu Dhabi Distribution Company, Performance Strategies, Celonis, ArcelorMittal, Intras, Moving Forward, TotalEnergies, Novartis, McKinsey, Everis, Making Science, and AT&T and international organizations such as United Nations, OECD, Africa Development Bank and World Knowledge Forum on issues relating to leadership development, executive coaching, 360 feedback and change management in Europe, Asia, the Middle East and United States.

More about her work can be found on the website: www.margaritamayo.com

Academic Background

PhD in Management Psychology, University of New York at Buffalo, USA
Fulbright Scholar, Harvard University, USA
MA in Social Psychology, Clark University, USA
BA in Psychology, Universidad Autónoma de Madrid, Spain

Academic Experience

Professor of Organisational Behaviour, IE Business School, 2000 to present
Visiting Professor at Lancaster Management School, Lancaster University, UK, 2009
Academic Director of the Centre for Diversity and Global Management, IE Business School, 2003-2009
Director of the PhD Programme, IE Business School, 2004
Assistant Professor of Business Administration, Richard Ivey School of Business, University of Western Ontario, USA, 1997 to 2000
Lecturer, Organisational Behaviour, University of New York at Buffalo, USA, 1994 to 1997

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PREREQUISITES

SUBJECT DESCRIPTION

This course offers frameworks, knowledge and tools to help you be more effective leading change and people transformations in both your work and your personal life. You will learn concepts and tools to help you achieve your personal development goals and higher order purposes including understanding yourself and others, leading people for transformation, and managing change in crisis as well as opportunity scenarios understanding who is involve; how they are engaging; and what tools you need to be used to achieve change and transformation.

LEARNING OBJECTIVES

This course aims at providing you with an understanding as well as practical tools you can apply, regarding managing personal change and people and organizational transformation moving away from a traditional leadership style to adopt a transformational leadership style that elevates your own goals and motivatates others to develop and grow. Key concepts and frameworks will include self-awareness, transformational and authentic leadership, coaching and development, and change management.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	20.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	20.0 %	15.0 hours
Individual studying	20.0 %	15.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

PART 1: PERSONAL CHANGE

SESSION 1 (LIVE IN-PERSON)

Overview of course syllabus and requirements

Introduction to the course.

Technical note: Managing Your Career (HBS 494082-PDF-ENG)

SESSIONS 2 - 3 (LIVE IN-PERSON)

Self-awareness and Personal Change

Article: MANAGING ONESELF (HBS R0501K-PDF-ENG)

Practical Case: Mike Miller (A) (HBS 482061-PDF-ENG)

PART 2: PEOPLE TRANSFORMATION

SESSIONS 4 - 5 (LIVE IN-PERSON)

Transformational Leadership

You will complete an online leadership test about your prefered leadership style. You will receive instruction in due course. Your individual report will be given to you in class.

Practical Case: Wolfgang Keller at Konigsbrau-TAK (HBS 498045-PDF-ENG)
Technical note: What leaders Really do (HBS R011F-PDF-ENG)
Technical note: What Makes a Leader? (HBS R040H-PDF-ENG)

PART 3: ORGANIZATIONAL CHANGE

SESSIONS 6 - 7 (LIVE IN-PERSON)

Coaching and Development

Practical Case: Coaching for Exceptional Performance Workshop (TCC 9B00C006)
Practical Case: Coaching for Exceptional Performance Workshop - Marketing Supervisor Role: Chris Parkins (TCC 9B00C007)
Practical Case: Coaching for Exceptional Performance Workshop - Market Development Manager Role: Kim Hughes (TCC 9B00C008)
Practical Case: Coaching for Exceptional Performance Workshop - Engineering Manager Role: Robin Maynard (TCC 9B00C009)
Practical Case: Coaching for Exceptional Performance Workshop - Telesales Supervisor Role: Kelsey Scott (TCC 9B00C010)
Practical Case: Coaching for Exceptional Performance Workshop - Market Analyst Role: Pat Cox (TCC 9B00C011)
Practical Case: Coaching for Exceptional Performance Workshop - General Production Supervisor Role: Lee Sewell (TCC 9B00C012)
Practical Case: Coaching for Exceptional Performance Workshop - Project Sales and Marketing Manager Role: Jody Hickson (TCC 9B00C013)
Article: The Leader as Coach (HBS R1906G-PDF-ENG)

SESSIONS 8 - 9 (LIVE IN-PERSON)

Multimedia Material: BELBIN Self-Perception Questionnaire (BEL)
Practical Case: Carter Racing Part A & B (KEL)

SESSIONS 10 - 11 (LIVE IN-PERSON)

Change Management I
Assessment

Multimedia Material: ExperienceChange Simulation (EXP)
Practical Case: DRW Techologies (in-class reading) (HBS 916535-PDF-ENG)

SESSIONS 12 - 13 (LIVE IN-PERSON)

Change Management II

Planning & Implementation

Article: Leading Change: Why Transformation Efforts Fail (HBS R0701J-PDF-ENG)

Article: Inside GE´s Transformation (HBS R1705B-PDF-ENG)

Article: Cracking the Code of Change (HBS R00301-PDF-ENG)

Multimedia Material: Experience Change Simulation (EXP)

SESSION 14 (LIVE IN-PERSON)

Group Presentations

SESSION 15 (LIVE IN-PERSON)

Final Exam.

Multimedia Material: Change Management Simulation: Power and Influence V3 (HBS 7611-HTM-ENG)

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	30 %		
Individual Work	20 %		
Group Work	15 %		
Group Presentation	15 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

Class participation (individual): 20% of your grade. Class participation will be evaluated in face-to-face. Everyone is expected to be prepared for each class and to be an active participant in class discussion. You are required to attend each one of the classes. Your participation grade will reflect my assessment of your total contribution to the learning environment. This includes not only the frequency of your contributions but also their quality. Participations are evaluated according to the following standard.

0: You do not do any of the following:

1-5: You are present, on time, and concentrated in class.

6-10: You are participating and are part of the discussion.

11-15: You are greatly involved in participation, having more than one good point to make.

16-20: You participate with really high-quality points, helping advance the in-class discussion and sharpening the in-class debate.

Quality includes among other things: (1) sound, rigorous, insightful diagnosis (e.g. sharpening of key issues, depth, and relevant of the analysis), (2) ability to draw on course materials nd your own experience productively, (3) professionalism of your conduct (attendance, punctuality, preparedness, and showing respect to all section members and their class contributions.)

Group Projects (in groups): 30% of you grade: You need to form a Learning Team with 4-5 members within the first week of the semester. This group has two major tasks: (1) group presentation, and (2) group work

Personal Development Plan (individual): 20% of you grade.

Final Exam (individual): 30% of your grade: The final exam takes place at the end of the course and covers all topics and readings addressed in the course.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

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Ø It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

!   Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

!   In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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IMAGINING YOUR FUTURE WITH YOUR BEST SELF

**Grado en Administración de Empresas / Bachelor in
Business Administration BBA SEP-2023 IYF-
NBA.1C.n.OPT.M.A**

Area Human Resources and Organisational Behaviour

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **STEPHANIE REINA**

E-mail: sreina@faculty.ie.edu

Stephanie Reina graduated Summa Cum Laude with a B.S.E. in Bioengineering from Arizona State University (USA). She also has an MBA from IE Business School (Spain) and an MSc in Applied Positive Psychology with Distinction from the University of East London (UK). She was a Fulbright scholar to Spain while pursuing her first graduate degree. Stephanie has been teaching at IE University since 2015. She teaches Applied Business Math, Math for Management, and electives, advanced seminars, and workshops through the IE Center for Health, Well-being, and Happiness. Past such courses include: Positive Organizational Behavior, Kindness, Empathy, and Compassion; and High-Performance Attention.

Stephanie's master's thesis focused on exploring the work values of Millennials and the relationship between meaning and job satisfaction. She presented her research at the 10th European Conference on Positive Psychology in 2022 in Reykjavik, Iceland and at the 5th Spanish Positive Psychology Congress in 2022 in Bilbao, Spain. She is interested in the applications of the principles of positive psychology to organizational behavior, parenting, and the use of social media. Stephanie is an active member of the Sociedad Española de Psicología Positiva. In 2021 she volunteered with the non-profit Life Vest Inside to be group leader for Dance for Kindness, a flash mob held at IE to promote kindness. In 2023, she participated as a volunteer in the World Happiness Summit held in Como, Italy. In her free time, Stephanie enjoys spending time with her family, studying, exercising, traveling, and salsa dancing. She is fluent in English, Spanish, and Italian and conversant in French.

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PREREQUISITES

Edited by Documentation
23th August 2023

There are no prerequisites for this course.

The workshop is focused on how to have a better life and invest in being your best self. In order to do that, you need to be brave, to reflect and to be honest with yourself. The 21st century needs a different type of leader and the skills you will learn are intended to prepare you for that challenge! Please don't choose this program if (PLEASE READ!):

- You don't want to reflect about your life.
- You don't want to share your personal experience with the class (we will apply Chatham House Rules).
- Or it's not the right moment and place to do either.
- You are not ready to help other people and open to be helped by your colleagues.
- You don't want to work hard!
- You don't have enough time to invest in your homework's (2 hours/ week).
- You don't like dynamic & participative sessions (this is a hands-on program!).
- You are not open to practice techniques such as mindfulness.
- You are not ready to contribute in each session.
- You can not survive without using your PC & phone for 2-3 hours.

SUBJECT DESCRIPTION

As university students, you are living an important time of self-discovery and growth, learning new concepts, living new experiences and finding out more about your values, emotions and aspirations. This course creates the space for experiential learning and growth from practice and insights, to challenge your automatic thinking as to what success is and provide the concepts and tools to reflect upon what is really important to you and then design the path to your ideal future, and building up the muscles to be prepared for any challenge that will be thrown your way. We will have the opportunity to explore more deeply essential skills and sharpen the tools in our skills toolbox through experience and practice.

We will cultivate greater awareness of self, and our own strengths and weaknesses, providing tools to practice and leverage for greater personal satisfaction and deeper connection with others. Throughout the course, students will work on and use various projects in which they will be expected to apply the theoretical concepts from class*.

LEARNING OBJECTIVES

This course has been designed with the intention of helping students to develop sensitivity to their inner self, to strengthen their awareness and reflect critically on their impact and to create the space to practice and grow to craft with intention the life path forward and take ownership for the life they want to live.

More specifically, this course aims to foster:

1. Greater appreciation of the holistic self.
2. Depth in understanding of critical skills for well-being and resilience.
3. A long-term perspective of happiness.
4. Appreciation of purpose and how to craft a life of meaning.

5. The ability to reflect, learn and grow, leveraging essential skills.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	40.0 %	30.0 hours
Discussions	6.67 %	5.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	13.33 %	10.0 hours
Individual studying	20.0 %	15.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to Happiness & Wellbeing

During Session 1, we will review in detail the course outline and expectations, including the evaluation method, participation, and course assignments. We will also use the session as an introductory discussion on the science of Happiness and Well-being, especially within the current context. This opening session will allow us to discuss expectations, ask questions and map our self-discovery journey.

Article: The Economics of Well-Being (HBS R1201D-PDF-ENG)

Technical note: Managing Oneself (HBS R0501K-PDF-ENG)

SESSION 2 (LIVE IN-PERSON)

Emotional Regulation & Positive Emotions

In preparation to our Leading People course, we will delve into emotions. What are emotions? What impact do emotions have on us, our decision-making and wellbeing? We will also discuss the utility of positive emotions and ways to accept all emotions and increase the positive emotions in our lives to foster improved emotional agility and self-management.

Article: Caught Up in Emotions: How to Handle Fear, Anger, and Embarrassment in Difficult

Conversations (HBS 6415BC-PDF-ENG)

Article: What If You Pursued Contentment Rather Than Happiness? (Greater Good Magazine)

Article: Broaden-and-Build Theory of Positive Emotions (Positive Psychology.com)

SESSION 3 (LIVE IN-PERSON)

Mindfulness

There has been a lot of hype around mindfulness, however what is mindfulness and how does it impact your happiness and wellbeing? We will slow down to better understand the role mindfulness play in leading a happy life and consider ways to incorporate mindfulness practices into our day to day routines. We will also practice a little!

Article: Mindfulness Isn't Much Harder than Mindlessness (HBS H02LOM-PDF-ENG)

Article: How to Override Your Default Reactions in Tough Moments (HBS H00RJ6-PDF-ENG)

Article: The Construct of Mindfulness (Journal of Social Issues, Vol. 56, No. 1, 2000, pp. 1–9) (CED)

Article: The Wise Leader (The European Business Review)

SESSION 4 (LIVE IN-PERSON)

Purpose & Values

Finally, we will build on our essential skills to create a more refined vision of our purpose and values, grasping a better understanding of our impact on our daily decisions, which build overtime to shape our perception of happiness. Please complete the Personal Values Assessment prior to class.

Article: How to Find Your Purpose in Life (Greater Good Magazine)

Other / Complementary Documentation: The VIA Character Strengths Survey (VIA Institute on Character)

SESSION 5 (LIVE IN-PERSON)

Gratitude

Gratitude is a skill to create a greater appreciation which in turn fosters positive emotions and greater resilience. How often do we stop to consider all we have in life? What does a lack of gratitude create? We will consider how can we pay closer attention to incorporate gratitude into our lives and create habits to increase our sense of contentment and satisfaction.

We will begin introducing a daily gratitude exercise into our learning.

Article: 7 Scientifically Proven Benefits of Gratitude (Psychology Today, April 3, 2015)

Article: Gratitude Really is Good for You. Here's What the Science Shows. (New York Times Company. Jun 8, 2023 (ced))

SESSION 6 (LIVE IN-PERSON)

Creativity & Flow

When was the last time you were bored? What emotions did it produce? What are you doing when time flies by? How can we develop knowledge and tools that will help creativity and working in flow to positively impact output and satisfaction? To further develop these skills, we will investigate our own strengths and how we can leverage them.

Article: Life's Work: An Interview with Erno Rubik (HBS R2006P-PDF-ENG)

Article: How Creativity Works (Greater Good Magazine)

Article: Nine Steps to Achieving Flow in your work (Greater Good Magazine)

SESSION 7 (LIVE IN-PERSON)

Altruism /Kindness

We know we should be kind to others, however do we know the positive impact of kindness on ourselves and others? We will consider this skill and the benefits of kindness, as well as ways to increase kindness to ourselves and those around us.

We will be introducing acts of kindness into our daily routine.

Article: 60 Powerful Kindness Quotes That Will Stay with You (Reader's Digest, Aug. 17, 2023)

Article: If You Want Your Business to Succeed, Cultivate Kindness (Next Big Idea Club, 9 May, 2016)

SESSION 8 (LIVE IN-PERSON)

Empathy

In an ever more polarized world of uncertainty and change, the ability to connect with others by understanding or feeling is an important skill. Empathy, not to be confused with emotional contagion, allows us to leverage diversity and drive greater outcomes through greater appreciation of others.

Article: What Is Empathy? (Very well mind, February 22, 2023)

SESSION 9 (LIVE IN-PERSON)

Self-Compassion

During Session 5, we will practice self-compassion, delving into what it is, why it is important, how we can develop this essential personal skill and how it relates to self-esteem. We will consider self-compassion within the context of our happiness and ability to thrive.

Book Chapters: The Self-Compassion Workbook for Teens: Mindfulness and Compassion Skills to Overcome Self-Criticism and Embrace Who You Are (See Bibliography)

Article: Elements of Self-Compassion (Center for Mindful Self-Compassion)

Article: Why Is the Pandemic So Hard on Young People? (Greater Good Magazine)

SESSION 10 (LIVE IN-PERSON)

Positive Social Relations

Learning to develop positive social relations is a skill that needs to be developed overtime. While we often take relationships for granted, we will consider the importance of developing and maintaining relationships and the impact they have on our perception of success and satisfaction in life, looking into the power of what others think of us, or FOMO – Sounds familiar?

Following this session where we will get creative around positive social relations, an activity will be required.

Article: How Many Friends Do You Really Need in Adulthood? (Psychology Today, August 9, 2019)

Article: You Asked: How Many Friends Do I Need? (Time, MARCH 18, 2015)

Article: How Many Friends Do You Really Need? (The New York Times, June 22, 2023)

SESSION 11 (ASYNCHRONOUS)

Manage Mentor – Leading People

For this session, please complete the Harvard ManageMentor course Leading People. See Session Materials. You will need to access the course through your Harvard Business Publishing account (or create one if you do not already have one).

The course learning objectives are the following:

1. Define your purpose, vision, and values as a leader.
2. Cultivate your emotional intelligence.
3. Build trust in your leadership.
4. Engage and motivate employees.

5. Lead with a global mindset.

Multimedia Material: Harvard ManageMentor: Leading People (HBS 7167-HTM-ENG)

SESSION 12 (LIVE IN-PERSON)

Forgiveness

What happens when we do not let things go? How does this impact our ability in the moment and beyond? We will delve into the power of forgiveness and the positive impact it can have in the short and long term.

For this session, a self reflection and assignment on forgiveness is expected.

Article: Eight Keys to Forgiveness (Greater Good Magazine, OCTOBER 15, 2015)

SESSION 13 (LIVE IN-PERSON)

Happiness

What is happiness? How can we define happiness? We will continue to build on our essential skills to gain a practical and personal understanding of happiness and how to cultivate a life with purpose and intention to create sustained happiness and satisfaction. Because happiness does not "happen"; it is a skill that requires regular practice.

Article: You Aren't Built to be Happy (Psychology Today.com)

SESSION 14 (LIVE IN-PERSON)

Group Presentations

During this session, you will present your group projects.

Practical Case: Values-based Candidate Selection at LinkedIn: One Hiring Manager's Approach (HBS W93C96-PDF-ENG)

Practical Case: Plante & Moran: All You Really Need to Know (WDI 1-428-759) (Will be published)

SESSION 15 (LIVE IN-PERSON)

Awe

When have we felt awe and how is awe relevant to our happiness and wellbeing? We will consider the greater impact of awe in our lives and how it contributes to our wellbeing. You will be expected to take time to cultivate Awe during the week.

Article: What Is Awe? (Greater Good Magazine)

Video: Why Awe Is Such an Important Emotion (Greater Good Magazine)

EVALUATION CRITERIA

Participation

As a class, we will work together to consider the various concepts, readings and cases, which serve as tools to foster the learning and application of knowledge. Your participation is key to creating the discussion and debate, where we can all gain insights from your experience and perspectives. Therefore, your preparation in advance of the class and your engagement in the course is critical.

Participation will be evaluated based on being on time, mentally present and prepared, as well as on staying engaged and most importantly, on making valuable contributions to class discussion that demonstrate understanding of the reading and of the themes being discussed in class.

Keep in mind, quality is more valued than quantity.

Homework

Short preparation assignments will be required in advance before some of the sessions.

Individual Assignment – Reflection and Learning

What advice would your future self be giving you now?

You will be expected to keep a personal journal throughout the class to document your key insights and learnings from the class, as well as your personal observations and reflections regarding how the concepts play out in your life, areas you feel comfortable and areas you look to further understand and apply. The personal journal is confidential, you do NOT have to turn it in. However, it is critical to keep a personal journal to be able to carry out the reflection and write the reflection paper. Your write-up will make it evident whether or not you kept a personal journal throughout the course.

You will need to deliver an in-depth reflection paper as to your understanding and experience with the essential skills covered in the course. From this, you will be expected to outline a personal plan of intention to incorporate learnings into your life to build experience and confidence in shaping your ideal future.

We will discuss the individual assignment in more detail during Session 1.

Group Project – Leadership and Essential Skills

How do these essential skills contribute to our ability to lead ourselves and others? Each group will be expected to create a leadership framework, which they will present to the class, as to how students can leverage their time at IE to develop the essential mix of skills for greater life satisfaction, happiness and success. A short written report is also required.

We will discuss the final group project in more detail during Session 1.

criteria	percentage	Learning Objectives	Comments
Individual Work	35 %		
Assignments	15 %		
Group Presentation	30 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

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for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

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BIBLIOGRAPHY

Recommended

- Karen Bluth and Kristin Neff. (2018). *The self-compassion workbook for teens : mindfulness and compassion skills to overcome self-criticis.* New Harbinger Publications. ISBN 9781626259843 (Digital)

BEHAVIOR RULES

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ETHICAL POLICY

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INDUSTRY 4.0

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 I40-NBA.1C.d.OPT.M.A

Area Information Systems and Technology

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MATT KING**

E-mail: mking@faculty.ie.edu

Matt is an entrepreneur with a passion for investigating the technologies that will shape the future. He has over 15 years of international experience in industry working within a research and development organisation, a SME, a MNC and most recently his own startup applying AI within the engineering and construction industry.

A lifelong learner, Matt has an executive MBA from INSEAD as well as a post-graduate Certificate in Technology Commercialization from McCombs Business School. He also holds an MSc from Southampton University and an MEng from University College London.

mking@faculty.ie.edu

PREREQUISITES

No prerequisites assumed or required. However, it is good if the students have a general interest in technology and the impact it is having on industry and society more broadly.

SUBJECT DESCRIPTION

The fourth industrial revolution is transforming business and society. In this course, students will examine the impact advances in technology are having, and will have, on the capabilities and business models of industry. The course will expose students to the dramatic changes that are currently taking place around the world in the way products are designed, manufactured and delivered to market, as well as how value adding services are being layered on top of traditional products.

By the end of the elective, students will understand the challenges and opportunities that technology provides to industry and how to best position themselves to exploit the changes ahead to their advantage.

LEARNING OBJECTIVES

Students will leave this course with:

- An understanding of the impact technology is having on industry,
- A broad understanding of industrial processes and ways of working,
- Knowledge of the key drivers, enablers, challenges and opportunities of industry 4.0,
- An appreciation of the key technology drivers of industry 4.0 such as IoT, cyber-physical systems, A.I. and
- Understanding the "smart" revolutions impact on the world,
- Knowledge of real-world cases studies and success stories of Industry 4.0,
- An ability to build strategies and roadmaps for the future of industry,
- The skills and toolsets needed to digitally transform an industrial business.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
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Discussions	6.67 %	5.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	26.67 %	20.0 hours
Individual studying	26.67 %	20.0 hours
TOTAL	100.0 %	75.0 hours

METHODOLOGY

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Into Industry 4.0

In this first session we will introduce the structure and main topics of the course.

- Course introduction
- Overview of main topics

SESSION 2 (LIVE IN-PERSON)

Continuous Revolutions

In this session we will put Industry 4.0 in its historical context:

- Industry 0.0 – 3.0
- Industry 4.0
- Continuous evolution in information and energy technologies

SESSION 3 (LIVE IN-PERSON)

How Stuff Gets Made

In this session we will discuss the main processes used in industry today:

- Continuous and discrete production
- 4 production processes: Lean, Agile, Waterfall and Modular
- Information architectures, MES and ERP

SESSION 4 (LIVE IN-PERSON)

It's not what you know

In this session we will look at the power and use of networks.

- Smart networks
- Network theory
- Small world networks
- Mobile devices
- A world of devices

SESSION 5 (LIVE IN-PERSON)

Information Theory

In this session we will cover the basics of information theory:

- DIKW pyramid
- Moore's Law
- Turing Machines
- And what they mean

SESSION 6 (LIVE IN-PERSON)

Automate Everything

In this session we will cover:

- Process automation
- Intelligent machines
- Robots
- Cyberphysical systems
- Industrial IoT
- Edge Computing

SESSION 7 (LIVE IN-PERSON)

We are living in a simulation

In this session we will cover:

- Cloud computing
- Digital twins
- Advanced simulation
- 3d printing

SESSION 8 (LIVE IN-PERSON)

Do androids dream of electric sheep?

In this session we will cover:

- What is AI
- Data science
- How to do AI
- Strong AI

SESSION 9 (LIVE IN-PERSON)

Distributed and decentralized

In this session we will cover:

- What is blockchain
- Distributed ledger technologies
- Mechanism design
- NFTs

SESSION 10 (LIVE IN-PERSON)

Byzantine empires

In this session we will cover:

- Security and risk
- Traditional cybersecurity
- Stuxnet Case Study
- Zero Trust Cybersecurity
- Useful Tools

SESSION 11 (LIVE IN-PERSON)

Apocalypse now

In this session we will cover:

- A cuationary tale
- Technology and risk
- Existential risksCircular economy

SESSION 12 (LIVE IN-PERSON)

Human to machine

This session will cover:

- Humans and machines
- Wearables
- Cyborgs
- VR, AR and XR

SESSION 13 (LIVE IN-PERSON)

Strategies for change

This session will cover:

- Digital transformation of industry
- Strategic implications for Industry 4.0
- Industry 4.0 business models

SESSION 14 (LIVE IN-PERSON)

Future of work

In this session we will examine the likely impacts Industry 4.0 will have on the world and on the future of work

- Economic impacts of industry 4.0
- Geopolitical and social impacts of industry 4.0
- How to survive and thrive in the fourth industrial revolution

SESSION 15 (LIVE IN-PERSON)

Putting it all together

In our final session we will review the key concepts of the course and bring them all together to map potential pathways for the development of the fourth industrial revolution.

- Review of the course
- Towards a smart future
- Additional tools and resources

EVALUATION CRITERIA

Class Participation (Individual Grade)

This grade reflects your active involvement and participation during class room discussions and is based on engagement with the core ideas presented during the course as well as comments and questions that benefit us all. Both quantity and quality are relevant and whilst consistent contribution is ideal a few points of genuine insight can go a long way.

Class Quizzes (Individual Grade)

There are two mini-assessments that will be delivered as multiple-choice open book exams. The first will cover sessions 1-7 and the second will cover sessions 8-14.

These are designed to follow the course and to check your understanding of the core concepts presented during class. Each assignment will need to be completed before the start of the next session.

Team presentations (Group Grade)

Team's will deliver a presentation to the class of their chosen industry 4.0 case study. Grades for the presentation will be based on:

- Explanation of the case   40%
- Use of course frameworks and tools   40%
- Communication of ideas   20%

Industry 4.0 Strategy Paper (Group Grade)

Teams will be tasked with completing a strategy report of their chosen technology or industry.

Grading will be based on:

- Demonstrating understanding of the course concepts   40%
- Robustness of chosen strategy   30%
- Concise and clear communication of ideas   20%
- Format and presentation   10%

criteria	percentage	Learning Objectives	Comments
Intermediate Tests	30 %		Individual Grade
Workgroups	25 %		Group Grade
Group Presentation	25 %		Group Grade
Class Participation	20 %		Individual Grade

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.
- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0)

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.
- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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ATTENDANCE POLICY

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INNOVATION & CONTINUOUS IMPROVEMENT

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 ICI-NBA.1C.s.OPT.M.A

Area Others

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **ANTONIO ZABALETA MORENO**

E-mail: azabaleta@faculty.ie.edu

Adjunct Professor of Operations Management at IE Business School

Professor Zabaleta is a professional and a researcher in the financial services area with more than 20 years of experience in international banking. Executive MBA at IE Business School. Professor at IE Business School. Researcher on Business Process Management (Lean And Six Sigma). Master in research and PhD in Business at Universidad Autónoma de Madrid. In the professional field, he is a Senior Manager, specialized in projects of different fields: Digital Banking, Innovation, Organization, Business Process Engineering, Operations, Efficiency; managing projects in the Financial Industry within an international scope (Spain, Mexico, South and Central America, United States, Turkey).

He is an expert in the application of Lean, Six Sigma, Business Process Engineering, Operations, Innovation and Project Management.

Academic Background

- International Executive MBA- IE Business School.

- PhD in Business- Universidad Autónoma de Madrid.

- Master in research- Universidad Autónoma de Madrid.

- Black Belt Six Sigma- Universidad Politécnica de Cataluña.

- European Financial Advisor EFPA- EUROPEAN FINANCIAL PLANNING ASSOCIATION.

- Graduate in Business- Universidad de Valencia.

- Design Thinking ambassador- BBVA.

- Agile ambassador- BBVA.

- Data Dev.-BBVA.

Professional Background

- BBVA Senior Project manager- Business Project Engineering.

- BBVA Senior Project manager- Digital Banking and Innovation.

- BBVA Project Manager- Business Transformation.

- BBVA Project Manager- Transformation, Productivity and New Business Models.
- BBVA International Branch manager.

Professor
- IE Business School. Project Management, Business Process Management, Innovation and Processes. Operations.
- Other Business Schools.

Publications
- "Financial impact of Lean and Six Sigma in the European Banking Industry".
- "Impact on results of Business Process Management methodologies in the Global Financial System".
- Author of academic contents in Banking Management, Business Process Management, Operations and Project Management.
  azabaleta@faculty.ie.edu

PREREQUISITES

None.

SUBJECT DESCRIPTION

Innovation, New Technologies, Transformation and New Business Models (NBM) are necessary in the current environment. This course will:
- Introduce students into the principal concepts of Innovation and Business Process Management/Transformation/New Technologies. Both Innovation/NBM, represent critical areas for today managers.
- Provide students with the necessary abilities, knowledge, methodologies and tools to implement these concepts in the real current business environment.
- Provide management capacities for process improvement and innovation in the current environment, in a practical way.

LEARNING OBJECTIVES

At the end of the course, students should be able to:
- Explain why uncertainty presents innovation opportunities in organizations, and how innovation management and process improvement can deal with it, both within and across projects, and over time.
- Describe how a systematic innovation approach, from the idea to concept to physical product or service, works and accelerates responsiveness in the organization.
- Discuss how innovation management can balance contradicting tensions, such as creativity and flexibility versus productivity and efficiency.
- Propose innovation and process improvement metrics.

- Discuss how organizations can facilitate or hamper the generation and transfer of innovation, NBM, and why large companies struggle with disruptive innovation.
- Propose ways in which innovation can be managed across organizational borders, and how firms can use external ideas (e.g. customers as innovators) for internal innovation.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	40.0 %	30.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	13.33 %	10.0 hours
Group work	20.0 %	15.0 hours
Individual studying	13.33 %	10.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

INTRODUCTION: INNOVATION, TRANSFORMATION AND NEW BUSINESS MODELS

Goals

Introduce the course: contents, structure, housekeeping rules and evaluation criteria.

Process Innovation, Transformation and New Business Models introduction.

Contents

- What is innovation?
- Why companies need innovation and process improvement?
- Current challenges.

Own Material: Project Charter template

Assignment:

After session 2, each group will select an innovative idea to develop an innovation project for this course, and fill in the Project Charter template.

SESSION 3 (LIVE IN-PERSON)

NEW IDEAS GENERATION AND INNOVATION

Goals

- Introduce the innovation process.
- Analyze the idea generation process.

Technical note: Creativity and Innovation in Organizations (HBS 396239-PDF-ENG)

Practical Case: What's the BIG Idea? (A) (HBS 602105-PDF-ENG)

SESSIONS 4 - 5 (LIVE IN-PERSON)

BUSINESS PROCESS INNOVATION

Goals

Understand and apply process fundamentals, process improvement, and manage process innovation.

Contents

- Process innovation.
- Process analysis.
- Capacity management.
- Obtain and analyze process information.
- Process maps to measure, control and improve processes.
- Variability in processes.

Technical note: Process Fundamentals (HBS 696023-PDF-ENG)

Practical Case: Aravind Eye Care System (OPE010056-U-ENG-HTM)

Technical note: Note on Service Mapping (HBS 693065-PDF-ENG)

SESSION 6 (ASYNCHRONOUS)

DISRUPTIVE INNOVATION & DIGITAL TRANSFORMATION

Goals

Examine the impact of digital transformation in an industry such as banking, addressing customer habit changes, new emerging competition and digital disruption.

Understand the importance of aligning company strategy with technology strategy, realizing IT decisions are business decisions, and overall digital solutions strategy and execution developed towards customer's importance.

Recognize the long-term approach of innovation in company culture, along with short-term execution.

Identify the changes happening in banking sector, and how Over-The-Top players (OTTPs) are entering into industries that are out of their domains today.

Learn how to respond against the new competition driven by these Over-the-top players, developing and executing a digital strategy.

Illustrate how fundamental is to offer digital solutions to your customers. Realize the difference between customer-driven decisions versus industry-driven decisions.

Reproduce and apply customer-focus decision making models for business problems, where technology plays a key role in the solution.

Summarize and contrast the impact of digital transformation in banking industry to other industries or business models: customer habit changes, new emerging competition and digital disruption.

Practical Case: Disruptive Innovation at BBVA (IST010063-U-ENG-HTM)

SESSION 7 (LIVE IN-PERSON)

LEAN AND PROCESS INNOVATION

Goals

Understand how Lean revolutionizes process innovation.

Contents

- Lean innovation.
- Techniques to eliminate waste.

SESSION 8 (LIVE IN-PERSON)

NEW TECHNOLOGIES AND INNOVATION

Goals

Understand the importance to manage properly New Technologies, Innovation and Customer Experience.

Contents

- Disruptive innovation and new technologies.
- New innovations, new technologies and profitability.

SESSION 9 (LIVE IN-PERSON)

INNOVATION STRATEGIES. IMPORTANCE OF BEING CUSOMER CENTRIC

Goals

- Co-creation of products with customers.
- Innovate in a customer-centric business model.
- Technology platforms.
- Open innovation platforms.
- Customer journeys.

Article: Which Kind of Collaboration Is Right for You? (HBR R0812F-PDF-ENG)

Practical Case: LEGO® Products: Building Customer Communities Through Technology (HBS W93C26-PDF-ENG)

SESSION 10 (LIVE IN-PERSON)

DESIGNING AND VISUALIZING SERVICE TOOLS

Goals

Designing, visualizing and innovating service processes in a practical way.

Contents

- Align innovative ideas with customer's needs and behaviors.
- Organizational capabilities for creativity and innovation.
- Design thinking phases: exploratory, concepting and prototyping.
- Importance of design.

Article: The Customer-Centered Innovation Map (HBS R0805H-PDF-ENG)

Practical Case: IDEO: Human-Centered Service Design (HBS 615022-PDF-ENG)

SESSION 11 (LIVE IN-PERSON)

SESSION DEDICATED TO THE FINAL PROJECT

SESSION 12 (ASYNCHRONOUS)

INNOVATION IN SERVICES: CURRENT CHALLENGUES

Contents

- Excellence in services.
- Customer satisfaction.
- New innovative business models.
- New market opportunities.

Technical note: Delivering Excellent Service: Lessons from the Best Firms (HBS CMR214-PDF-ENG)

Practical Case: AmazonFresh: Rekindling the Online Grocery Market (HBS 615013-PDF-ENG)

SESSION 13 (LIVE IN-PERSON)

INNOVATION IN REAL PRACTICE

Practical Case: New Venture Simulation: The Food Truck Challenge (HBS 7201-HTM-ENG)

SESSIONS 14 - 15 (LIVE IN-PERSON)

GROUP PROJECT PRESENTATIONS AND WRAP-UP/CONCLUSIONS

EVALUATION CRITERIA

The performance evaluation of the knowledge acquisition will be based on the following elements:

criteria	percentage	Learning Objectives	Comments
Final Project	35 %		
Group Evaluation	25 %		
Class Participation	40 %		

RE-SIT / RE-TAKE POLICY

Class Participation

Grades are based on: your attendance and your contributions to class discussions.

Participation is assessed on two criteria—quality and quantity.

Group evaluation

Group evaluation is based on 2 group reports of 2 cases: word documents, answering the questions proposed by the professor for each case.

Final Project

The goal is to apply the concepts learned in this course. Further details will be provided in class.

Important points for the Final Project:

- Proposed a service innovative idea.
- Gather all the information.
- Perform a customer behavior research. Develop an interview/research outline. Investigate latent customer needs.
- Build a customer journey.

- Prototype.
- Co-creation with customer. Direct customer engagement.
- Define an implementation plan.
- Consider actual environment: AI, Blockchain, task automation, digital transformation, Big Data, Internet of things...

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Regarding to the newly implemented ´liquid learning´ model, all students must still abide by the same IEU attendance policy, including those students who are connecting remotely to class sessions and not physically in the classroom because they are unable to be physically in Spain, on campus. During the sessions, students connecting remotely are required to fully connect their camera and microphone at all times, and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

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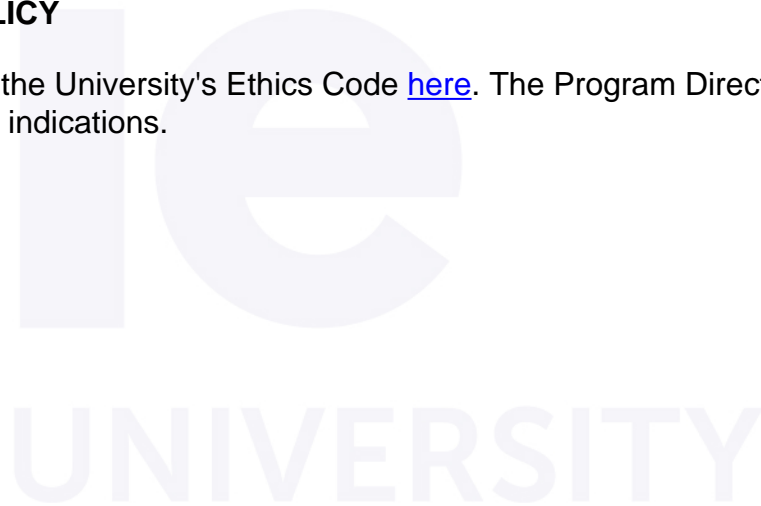
BEHAVIOR RULES

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INNOVATIVE BUSINESS MODELS AND DIGITAL TRANSFORMATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 IBMDT-NBA.1C.s.OPT.M.A

Area Others

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **PETTERI LEPPÄNEN LEPPÄNEN**

E-mail: pleppanen@faculty.ie.edu

Petteri Leppänen is Assistant Professor of Strategy at IE University. He teaches competitive strategy and business model innovation at IE and has previously taught courses also on corporate innovation and entrepreneurship at other universities. Prior to his current position, he was a Research Associate at Imperial College London, UK. He received his PhD in Strategic Entrepreneurship from the Technical University of Munich and was a visiting scholar at New York University and Singapore Management University. Before academia he worked in management consulting and studied economics and business administration in Finland and Germany.

Professor Leppänen's research focuses on organizations at the intersection of strategy, innovation, and entrepreneurship. Specifically, he seeks to understand how firms design novel business models in rapidly evolving environments characterized by new technologies. This includes studies on how organizations plan and run experiments, how they learn and adapt, and how they create and capture value through innovative business models. Professor Leppänen employs a variety of analytical methods and uses empirical settings ranging from online businesses to basketball teams and spaceflight. His research has been published in leading journals such as the Academy of Management Journal and Entrepreneurship Theory & Practice.

pleppanen@faculty.ie.edu

PREREQUISITES

Basic knowledge of strategy, entrepreneurship, and/or innovation is required.

SUBJECT DESCRIPTION

What is a business model? How do you design one and change it to another one? What is a value proposition? Why do firms use certain revenue models but not others? What is business model innovation and how do you make that happen? How do new technologies such as AI, blockchain, and Internet of Things link to novel business model designs? These are some of the most relevant questions that this course deals with and tries to answer through in-class discussions and many helpful examples from real life.

Business model innovation involves rethinking and redesigning the way an organization creates, delivers, and captures value. It can help organizations discover new sources of revenue, improve their efficiency and effectiveness, and better meet the needs of their existing and new customers. Business model innovation is important because it allows organizations to create new value and drive growth. In today's fast-paced and competitive business environment, organizations must continuously evolve and adapt in order to stay relevant and succeed. By adopting a culture of business model innovation, organizations can stay ahead of the competition and position themselves for long-term success.

This course will introduce students to the concepts of business model and business model innovation and explore how organizations can use this approach to find novel sources of value and boost development. Through a combination of lectures, discussions, case studies, and hands-on exercises, students will learn how to identify and evaluate potential business model innovations, develop and test new business models, and implement business model innovations in different types of organizations. Although the primary focus of this course lies on digital solutions, offline and low-tech industries are discussed as well. Consequently, this course will equip students with a thorough understanding of how firms design and innovate their business models and how they grow. Hence, students will be able to comment and analyze on existing business models and ideally be capable of becoming designers of innovative business models.

LEARNING OBJECTIVES

- Understand the concept of business model and business model innovation and their role in driving organizational growth and success.
- Distinguish between business model and strategy.
- Identify and evaluate potential business model innovations in a variety of contexts.
- Develop and test new business models using a systematic and iterative approach.
- Know how to implement business model innovations successfully.
- Understand how digital technologies facilitate novel business models.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	6.67 %	5.0 hours
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Group work	9.33 %	7.0 hours
Individual studying	50.67 %	38.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

What is a business model and why does it matter?

Book Chapters: Business model innovation strategy; Chapter 1 (See Bibliography)

SESSION 2 (LIVE IN-PERSON)

Novel value creation mindset.

Book Chapters: Business model innovation strategy; Chapter 2 and 3 (See Bibliography)

SESSION 3 (LIVE IN-PERSON)

Case discussion: Shein vs. Zara.

Practical Case: SHEIN vs. Zara: Digital transformation in the fast-fashion industry (HBS HK1327-PDF-ENG)

SESSIONS 4 - 5 (LIVE IN-PERSON)

Business model innovation with design thinking and creativity.

Book Chapters: Business model innovation strategy; Chapter 4 and 5 (See Bibliography)

SESSION 6 (LIVE IN-PERSON)

Dynamic design of new business models.

Book Chapters: Business model innovation strategy; Chapter 6 (See Bibliography)

SESSION 7 (LIVE IN-PERSON)

Business model design methods.

Book Chapters: Business model innovation strategy; Chapter 7 (See Bibliography)

SESSION 8 (LIVE IN-PERSON)

NICE framework & Other tools.

Book Chapters: Business model innovation strategy; Chapter 8 and 9 (See Bibliography)

SESSION 9 (LIVE IN-PERSON)

Virtual Reality & Metaverse: Practical session at IE's VR facilities.

No readings assigned for this session.

SESSION 10 (LIVE IN-PERSON)

Case discussion: Nike in the metaverse.

Practical Case: Nike: Tiptoeing into the Metaverse (HBS KE1213-PDF-ENG)

SESSION 11 (LIVE IN-PERSON)

Implementation of new business models in established firms.

Book Chapters: Business model innovation strategy; Chapter 10 (See Bibliography)

SESSION 12 (LIVE IN-PERSON)

Implementation of new business models in new firms.

Book Chapters: Business model innovation strategy; Chapter 11 (See Bibliography)

SESSION 13 (LIVE IN-PERSON)

Digitalization and business models.

Book Chapters: Business model innovation strategy; Chapter 12 (See Bibliography)

SESSION 14 (LIVE IN-PERSON)

Case competition (presentations): each team will work on an assigned case company's business model, develop a solution, and present it in this session. The case and instructions will be revealed one week ahead. The teams will submit their slides one day before the session.

SESSION 15 (LIVE IN-PERSON)

Final exam: the final exam covers all sessions, including the course literature, slides, discussions, and other possible readings such as the cases. The final exam will consist of multiple choice questions.

EVALUATION CRITERIA

1. The **final exam (60% of the overall grade)** will include all content from session 1 to session 14 included in the textbook, slides, case studies, and other possible readings. A necessary

requirement to pass the course is getting a minimum of 50% of the questions right in the final exam. If the student does not reach the minimum threshold, the course will be considered FAILED. Students will lose the grades of the group assignments, case competition, and participation and they will have to retake the exam.

2. The **group assignments (15% of the overall grade)** include development of new business models in assigned contexts. The teams develop solutions according to the instructions of each assignment that will be uploaded with time and in accordance with the structure of the course and its learning objectives.

3. The **case competition (15% of the overall grade)** will take place in session 14. You will work in teams and be assigned a short case with questions to solve. You will upload your slides and deliver a final presentation of your solution.

4. **Individual participation (10% of the overall grade)** will be evaluated based on three main criteria:

    1. Depth and quality of contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

    2. Moving your peers' understanding forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

    3. Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once the threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

criteria	percentage	Learning Objectives	Comments
Final exam	60 %		
Group assignments	15 %		
Case competition	15 %		
Individual participation	10 %		

RE-SIT / RE-TAKE POLICY

Each student has four chances to pass any given course distributed over two consecutive academic years. Each academic year consists of two calls: one ordinary call (during the semester when the course is taking place); and one extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that academic year and have to re-take the course (i.e., re-enroll) during the next academic year.

The extraordinary call evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June/July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next academic year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.).

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only, i.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous academic year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that academic year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, an assignment, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next academic year as a re-taker and pay the corresponding tuition fees. As you know, students have a total of four allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- Amit, R. & Zott, C. (2020). *Business model innovation strategy: Transformational concepts and tools for entrepreneurial leaders.* John Wiley & Sons, Hoboken, NJ, USA. ISBN 9781119689683 (Digital)

Recommended

- Osterwalder, A. & Pigneur, Y. (2010). *Business model generation: A handbook for*

visionaries, game changers, and challengers. John Wiley & Sons, Hoboken, NJ, USA. ISBN 9780470876411 (Digital)

BEHAVIOR RULES

Please, check the University's Code of Conduct [here](). The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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INTERNATIONAL FINANCIAL INSTITUTIONS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 IFI-NBA.1C.n.OPT.M.A

Area Finance

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **PABLO SIMÓN CABO**

E-mail: psimon@faculty.ie.edu

Professor PABLO SIMÓN CABO

Pablo Simon has 15 years of experience in the Interest Rates Desk as Executive Director at BBVA Corporate and Investment Bank. As Senior Government Bonds Trader, he has held different responsibilities as market maker (BBVA is Primary Dealer of several European Governments: Spanish Tesoro, Portuguese Tesouro Members of the Bund Auction Group for Deutsche Finanzagetur, Single Market Specialists for Dutch State Treasury Agency, Recognized Dealers of the Belgian Debt Agency). He was the responsible, within the Govies Trading Desk, for the development of BBVA's e-commerce related activities.

He is the CEO and founder of Qurado, a marketplace that gathers food producers.

psimon@faculty.ie.edu

PREREQUISITES

There are no compulsory prerequisites.

SUBJECT DESCRIPTION

No one can deny that knowing the theory is key to developing a professional career within the financial world. But it is also true that mastering a set of theoretical concepts in most cases is not enough to pass an interview process successfully to enter this challenging industry.

This subject will show the functioning of the different financial markets from the inside, taking advantage of the teacher's privileged position within the Global Markets unit of a bank, providing the students with a clear understanding of what is traded in the market, who are the main participants and what skills are needed in the most important roles of the industry.

LEARNING OBJECTIVES

The main goal of the subject is to provide students with a great understanding of financial markets with a practical approach: what products can be traded, who are the important players in the market and what different roles can be found in these companies.

At the end of the semester, students are expected to have a clear understanding of:

- The different asset classes that can be traded in financial markets (fixed income, both corporate and public; equity; currencies; commodities,…)
- How different markets work in real life, both organized markets (exchanges) and over-the-counter markets (trades on the phone, Bloomberg chats,…)
- Which are the main participants in the markets: Investment Banks, Institutional Funds, Sovereign Wealth Funds, Central Banks Reserve Management,…
- What different roles can be found inside the companies above (traders, research analysts, Sales,…) and what skills are needed
- Which are the main monetary authorities, which are their different mandates and how they influence the markets

All the previous would enable students to make an informed choice of potential career path. Here are only a few of the questions that may be on students' minds and, hopefully, will get clarified after the semester:

- Who does what in Financial Markets? What is the difference between a Total Return Fund and a Pension Fund?
- My profile is not very quantitative (actually I hate Excel), but I love Financial Markets… Should I give it a try? Is there any role that suits my skillset?
- I love Financial Markets and I am great at Financial Maths and Equity Valuation Models! I have real fun running correlations in Excel…. Does my skillset fit into a Quant role inside the Investment division of a top bank or should I apply for a role as Portfolio Manager in a Hedge Fund?
- Are rating agencies really independent or are they a strong lobby? How useful they are? Can the market live without them?
- How does a country fund its needs in the markets? What is a Government bond auction? Who can attend it? And a syndication?
- I am the CFO of a SME and need to take decisions to minimize some risks my company is facing. How should I proceed? In theory I can trade some derivatives but, are they available to such a small company? Do I have more alternatives?
- I don't understand anything when I read the Financial Times. Should I quit and apply for a role in marketing?

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	26.67 %	20.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	26.67 %	20.0 hours
Individual studying	13.33 %	10.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

The course will cover the different topics listed below. The order will be adapted to facilitate the attendance of guests as they are an important asset for this subject.

- Main Financial Markets:
    - Equity markets, the most popular for students: what are they and how do they function in real life

SESSION 2 (LIVE IN-PERSON)

- How does an exchange work? Let's see the different types of orders that can be placed and create an order book in class.
- A day in the life of an Structured Equity Sales, an Equity Research Analyst, an Execution Trader, a Volatility Trader (video/guest)

SESSION 3 (LIVE IN-PERSON)

- How does an exchange work? Let's see the different types of orders that can be placed and create an order book in class.
- A day in the life of an Structured Equity Sales, an Equity Research Analyst, an Execution Trader, a Volatility Trader (video/guest)

SESSION 4 (ASYNCHRONOUS)

Forum: create an order book among all the students. Keep record of all the executed trades and calculate individual Profit and Loss

SESSION 5 (LIVE IN-PERSON)

- Fixed Income, the great unknown!
    - What is a bond? How is it issued? Who raises funds in the fixed income market?

Private: Corporate Bonds Market (how companies fund themselves? Is there a secondary market?

Public: Government bonds market

SESSION 6 (LIVE IN-PERSON)

- Foreign Exchange Markets
  - Apart from pure currency exchange, what products can we find in the market?
  - A day in the life of an FX Forward Trader

SESSION 7 (ASYNCHRONOUS)

Forum: Following the timing of a Government Bond auction (bonds announcement, size announcement, auction day). Elaborate on price action around it

SESSION 8 (LIVE IN-PERSON)

Mid-term

- Main players/roles in the Financial Markets:
  - Public / Semi-public actors:
    - Countries: Debt Agencies and Treasuries (concepts and real functioning of auctions, syndications, Primary Dealers, market makers,…)

SESSION 9 (LIVE IN-PERSON)

- Main players/roles in the Financial Markets:
  - Public / Semi-public actors:
    - Countries: Debt Agencies and Treasuries (concepts and real functioning of auctions, syndications, Primary Dealers, market makers,…)

SESSION 10 (LIVE IN-PERSON)

- A day in the life of the Head of an European Treasury
- A day in the life of a Market Maker Government Bonds Trader

SESSION 11 (LIVE IN-PERSON)

- Main players/roles in the Financial Markets:
  - Public / Semi-public actors:
    - Countries: Debt Agencies and Treasuries (concepts and real functioning of auctions, syndications, Primary Dealers, market makers,…)
- A day in the life of the Head of an European Treasury
- A day in the life of a Market Maker Government Bonds Trader
  - Central Banks: what is their role? Main Central Banks and to what extent they influence the markets (Quantitative Easing,…) Supranationals: ESM, EFSF

SESSION 12 (LIVE IN-PERSON)

- Main players/roles in the Financial Markets:

- Public / Semi-public actors:
    - Countries: Debt Agencies and Treasuries (concepts and real functioning of auctions, syndications, Primary Dealers, market makers,…)
- A day in the life of the Head of an European Treasury
- A day in the life of a Market Maker Government Bonds Trader
    - Central Banks: what is their role? Main Central Banks and to what extent they influence the markets (Quantitative Easing,…) Supranationals: ESM, EFSF

SESSION 13 (LIVE IN-PERSON)

- Private:
    - Industrial companies: how do they use financial instruments?
    - Banks: what do different units do?
- Investment banking: M&A, Global Markets,…
    - Roles: Sales, Trading, Research, Structuring Desk, Syndication Desk
- Commercial banking: how does it connect with Financial Markets?
    - ALM'sFund managers: different types of Funds? Hedge Funds? Pension Funds? Total Return Funds? Sovereign Wealth Funds?
- How do they invest?
    - Rating Agencies: how do they affect investment decisions?

SESSION 14 (LIVE IN-PERSON)

Wrap-up and preparation for the exam

SESSION 15 (LIVE IN-PERSON)

Final Exam

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	55 %		It will include applied theory and practical exercises.

Class Participation	15 %		Students are expected to participate actively (and voluntarily) during lectures. Given the approach of the class, it will be key for the good functioning of the sessions. Class participation grade will be based on attendance, punctuality, participation and class conduct – there may be a penalty if the student creates a disruption, talks excessively or use electronic devices.
Individual Work	30 %		At least two assignments (essays on visit to BBVA and guests)

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

As a result of IE's ´liquid learning´ model, all students must abide to the attendance policy for AY 2021-22 where physical (in-person) attendance to class is compulsory for all regular Face-to-Face courses. Those students who, due to exceptional cases (that have been pre-approved by IE), are connecting remotely to class sessions and not physically in the classroom are required to fully connect their camera and microphone at all times , and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Ø Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

Ø It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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INTRODUCTION TO LUXURY MANAGEMENT

**Grado en Administración de Empresas / Bachelor in
Business Administration BBA SEP-2023 ILM-
NBA.1C.n.OPT.M.A**
Area Strategy
Number of sessions: 15
Academic year: 23-24
Degree course: 3º/4º
Number of credits: 3.0
Semester:
Category: OPTIONAL
Language: English

Professor: **DAVID MILLAN PLANELLES**

E-mail: dmillan@faculty.ie.edu

"The IE classroom is an outstanding environment to develop a truly strategic mindset". David Millán believes in the educational and experiential value of the course. "This is a time when students are encouraged to go through an analytical process which enhances their capabilities", he says. Hence the teaching approach is focused on the concepts but also in the ability to develop those personal skills. When it comes to areas of interest, Prof Millán believes that one of the truly strategic concepts is the process of value creation. "It is amazing how corporation decide which their sources of value creation are and how they put them into practice. One needs to understand that value is a far more important concept than sales or growth", he says. On the professional side, Prof Millán is dedicated to help corporations to take strategic decisions and hence build competitive advantages. "In these days we are living, we need to rethink the sources of competitive advantage. I believe we are currently living not only a change in the international relationships but also, and more importantly, a change in the mindset of our society. This is why we can not rely on the same competitive forces of the past".

Academic Background

- International PhD in Business Administration, Universidad Politécnica de Valencia, Spain
- IMBA, IE Business School, Spain
- IMBA Intensification in Marketing (with honors), Schulich School of Business, Toronto, Canada
- Degree Science Engineering, Universidad Politécnica de Valencia, Spain
- Mechanical Engineering intensification, Swiss Institute of Technology, ETH Zurich, Switzerland

Academic Experience

- Adjunct professor of Strategic Management and Luxury Strategy, IE Business School.
- Visiting professor of Strategy and Marketing, INCAE Business School.
- Visiting professor of Strategy and Marketing, International University of Monaco.
- Visiting researcher, INSEAD.

Publications

- Book. "Strategic Luxury Management". Routledge, 2021

Edited by Documentation
28th June 2023

- Award. Best Case, IE Case Competition (2020). Case study: "El Confidencial. Leading the revolution of the newspaper industry".
- Award. Best Entrepreneurship Case, EFMD 2018. Case study: "MB&F, The management of creativity".
- Award. Best Case. IE Case Competition (2014). Case study: "Porsche AG. Beyond the limits of luxury?.
- Award. Mention of Honor, IE Case Competition (2013). Case study: "LVMH & Bulgari. Time for Luxury".
- Article. "El concepto de lujo. Un enfoque estratégico". Harvard Deusto Business Review, 2013
- Article. "Competencia internacional en un entorno sin paradigmas" Harvard Deusto Business Review 2012
- Book. "Cuestión de Valor. De querer Vender a saber Competir". Wolters Kluwer, 2011
- Award. Best Management Article of the Year, Fundación RuralCaja, 2010

Corporate Experience

- Independent Senior Management Advisor.
- Marketing Director, DOMA Yachts, Alicante, Spain.
- Consultant Product Launch, Turrones 1880, Jijona, Spain.
- Project Manager, ALTEC Automotive GmbH, Stuttgart and Hof, Germany.
- Development Engineer, CYPE Ingenieros, Alicante, Spain.
- Design Engineer, Rolls Royce, Berlin, Germany.
- Trainee Engineer, ABB Turbo Systems, Baden, Switzerland.
    dmillan@faculty.ie.edu

PREREQUISITES

SUBJECT DESCRIPTION

This is an introductory course to the luxury industry, where the students will be exposed to the fundaments and principal aspects of the analysis of luxury firms.

The current environment and the traditional paradigms associated to luxury corporations will be object of discussion. The student will gain a wide perspective to analyse today's challenges. Likewise, the course will cover the fundamental strategic issues across several industries, such as Leather & Fashion, Watches, Yachting, Wine & Spirits or Jewellery.

LEARNING OBJECTIVES

Through the identification of the main characteristic of the different luxury industries, the course focuses on strategic analysis and how to build competitive advantage at the business level. The main theories, models and tools within the field of strategy will be reviewed with a strong emphasis in its application to ambiguous real settings.

This course seeks to develop the following competencies and skills:

- Gain an understanding about the different luxury markets and its main characteristics (e.g. automobile, fashion & accessories, watches & jewellery, gourmet & wines and yacht).
- Gain an understanding of the main frameworks, processes and methodologies commonly used to formulate the strategy of luxury goods.
- Gain an understanding about the managerial dilemma between the "creative driven" approach and the "market driven" approach.
- Gain practical experience in developing strategies where creativity is key, and understand how it differ from other traditional methodologies to formulate the strategy.
- Develop your skills toward the appreciation of creativity as a business asset.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	26.67 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	0.0 %	0.0 hours
Group work	33.33 %	25.0 hours
Individual studying	20.0 %	15.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Course Introduction & The concept of Luxury.

In this session, we will explore the concept of luxury with an anthropological perspetive.

We will pay attention to what luxury meant for previous/ancient societies and what we can learn out if it.

Book Chapters: Strategic Luxury Management (Chapter 1) (See Bibliography)

SESSION 2 (LIVE IN-PERSON)

Course Introduction & The concept of Luxury.

In this session, we will explore the concept of luxury with an anthropological perspetive.

We will pay attention to what luxury meant for previous/ancient societies and what we can learn out if it.

SESSION 3 (LIVE IN-PERSON)

Luxury and its managerial challenges.

What problems do normally luxury companies face? Is the management of a luxury firm somehow different from other (non-luxury) business?.

In this session we will explore the problems involved in managing a luxury firm and to what extent traditional management framework respond to those challenges.

Book Chapters: Strategic Luxury Management (Chapter 2) (See Bibliography)

Practical Case: Porsche AG. Beyond the limits of Luxury? (STR010106-U-ENG-HTM)

Group Work: See group project description for details.

SESSION 4 (LIVE IN-PERSON)

Luxury and its managerial challenges.

What problems do normally luxury companies face? Is the management of a luxury firm somehow different from other (non-luxury) business?.

In this session we will explore the problems involved in managing a luxury firm and to what extent traditional management framework respond to those challenges.

Group Work: See group project description for details.

SESSION 5 (LIVE IN-PERSON)

Essence of Luxury: The source of Extraordinariness.

What qualifies a luxury firm? How companies can create value as a luxury player?

In this session we will approach to the value creation process of luxury.

Book Chapters: Luxury Strategic Management (Chapter 3) (See Bibliography)

Group Work: See group project description for details.

SESSION 6 (ASYNCHRONOUS)

Essence of Luxury: The source of Extraordinariness.

What qualifies a luxury firm? How companies can create value as a luxury player?

In this session we will approach to the value creation process of luxury.

Group Work: See group project description for details.

SESSION 7 (LIVE IN-PERSON)

Nature of Luxury: The role of creativity.

Why creativity is so important for luxury firms?, And what implications does creativit bring to the managerial of luxury?

Creativity is a fundamental driver behind the rationale and success of a luxury player.

In this session we will unveil the critical difference between the creative process and the management of creativity.

Book Chapters: Strategic Luxury Management (Chapter 4 and Chapter 5) (See Bibliography)

SESSION 8 (LIVE IN-PERSON)

Nature of Luxury: The role of creativity.

Why creativity is so important for luxury firms?, And what implications does creativit bring to the managerial of luxury?

Creativity is a fundamental driver behind the rationale and success of a luxury player.

In this session we will unveil the critical difference between the creative process and the management of creativity.

SESSION 9 (ASYNCHRONOUS)

Means of Luxury: Unveiling Luxury competion.

Book Chapters: Strategic Luxury Management (Chapter 6) (See Bibliography)
Group Work: See group project description for details.

SESSION 10 (LIVE IN-PERSON)

Means of Luxury: Unveiling Luxury competion.

Group Work: See group project description for details.

SESSION 11 (LIVE IN-PERSON)

Managing Luxury today.

In this session we will some key aspects that shape luxury today, such as:

The role of conglomerates vs independent firms, the digital disruption, and how to engage with younger generations.

Technical note: Strategic Luxury Management (Chapter 7) (See Bibliography)
Group Work: See group project description for details.

SESSION 12 (LIVE IN-PERSON)

Managing Luxury today.

In this session we will some key aspects that shape luxury today, such as:

The role of conglomerates vs independent firms, the digital disruption, and how to engage with younger generations.

Group Work: See group project description for details.

SESSION 13 (LIVE IN-PERSON)

Course Overview.

SESSION 14 (LIVE IN-PERSON)

Group Project presentations.

SESSION 15 (LIVE IN-PERSON)

Group Project presentations.

EVALUATION CRITERIA

Class participation

Class participation is essential in order for you to get the maximum benefits from the course. I will rely on the quality of interventions, rather than their quantity, to evaluate your participation. A good intervention advances the class understanding of the issue and builds on previous comments. Class participation is more valuable when is the outcome of previous preparation of the readings and content covered on each session.

Likewise the student will be asked ot perform individual assignements that will contribute to his class partipation grade. Further information will be provided in class.

Individual Exam

More information will be delivered in class on Session 1.

Group Presentation - Luxury firm analysis.

Guidelines

Today luxury firms face a wide array of challenges to remain competitive. The evolution of the market and the client base make more difficult for luxury firms to sustain or even enhance their market positioning. This project is intended to reserach the current state of a luxury firm to gain a deeper understanding of the way the firm competes in the market.

The instructor will offer alternatives of luxury frims to choose from. Nevertheless the groups are free to select their own company, always under the supervision of the instructor.

A part of the sessions described below will be used by the teams to transfer the lessons of the course into their analysis of the luxury firm selected. The teams can use the following description as a guidance.

Sessions 3 - Company selection.

In this session the team will work on the identification and justification of the firm selected. At this stage the group should gain an understanding of why this is a luxury. Likewise the group will research the industry and gain critical lessons (like the role technology, client profile evolution,..) and identify key players of the industry.

Session 6 - The firm, antecedents and its strategy.

In this session the team will concentrate on the firm. The team must gain a deep understanding of their origins, the reasons for its early success/failures and their current strategic positioning. Aspects to be clarified at this stateb are: the source of Competitive Advantage, key resources and capabilities to sustain their market positioning, the firm's marketing mix.

Session 9 - The firm and its current situation.

In this session the tema will explore the current situation of the firm. The analysis in the previous stages was meant to provide an advance knowledge of the firm and the industry. Here the team will use those lessons to identify potential areas of improvement and analyze what market changes could impact its current situation. Likewise, the team is expected to reflect of the role of creativity, idenitfying the creative value system. To conclude, the team will concentrate on the lessons gained and the articulation of the final presentation. Which lessons have we obtained with this project?, Are we sure we have a clear answer to the question we originally defined?, which are the key course lessons that have helped gained a better understanding of the selected firm?

Presentation.

The presentation will cover the following parts. This is a suggested strucutre to help you understand the delviery, feel free to modify or change if needed.

Part 1. Analysis of the Luxury Firm

- Source of extraordinariness (ESSENCE). why this is/was a luxury firm?, rationale for their value creation and existence as a luxury firm.

- This might include the understanding of their Origins (founder, reasons for early/later success,

reasons for decay if any, reason for iconic products, key R&C…)

‐ The firm today (MEANS): Comprehensive overview of the firm and how they compete (financial overview, product portfolio, price range, target customer, distribution systems, communication tactics…)

Part 2. Analysis of the Luxury Market (Industry)

‐ Situation analysis. Key current market facts (market size, growth, trends, players…)
‐ Creative Value System (NATURE). Role of Creativity in this industry: how does it work and why.

Part 3. Assessment of Current Situation.

‐ Any major problem/issue identified? Any area of improvement/inconsistency?
‐ No need for an actual recommendation or plan.
‐ Insights/Lessons of the team based on firm's strategy.
‐ How positive/negative are you about the future development of the firm?, why?

Delivery

‐ 15 min presentation, plus 5min Q&A. (subject to be modified based on total number of students).
‐ Creativity welcome (no need of ppt, role play...)
‐ Include a final slides stating all the sources used in your research.

Grade Scheme

The academic performance of students is based on a 10 point scale according to the grading ranges below:

‐ 0.0 - 4.9: Fail (F)
‐ 5.0 - 6.9: Pass (P)
‐ 7.0 - 8.9: Very Good (VG)
‐ 9.0 - 10: Excellent (E)

criteria	percentage	Learning Objectives	Comments
Final Exam	40 %		
Group Presentation	40 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls(ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

‐ Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

‐ It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in

advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- David Millán Planelles. (2021). *Strategic Luxury Management.* Routledge. ISBN 9780367858377 (Printed)

BEHAVIOR RULES

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INVESTMENT ANALYSIS AND PORTFOLIO MANAGEMENT

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 INAN-NBA.1C.n.OPT.M.A

Area Finance

Number of sessions: 25

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 5.0

Semester:

Category: OPTIONAL

Language: English

Professor: **PAOLO GIANCANE**

E-mail: pgiancane@faculty.ie.edu

PAOLO GIANCANE

Paolo Giancane has been the Deputy General Manager of UniCredit's corporate finance team in Beijing and Hong Kong from the establishment of the practice in 2005 through 2009. During this period he participated in several equity financings on behalf of Chinese clients. He also advised European clients in prospective investments in China and divestitures of European assets to Chinese buyers. In the last 2 years, Mr. Giancane has continued to advise Chinese private equity funds and European strategic investors in cross-border investments, currently on behalf of a leading Chinese merchant bank.

He has lived and worked in China since 2005, principally in Beijing and Hong Kong, where he developed strong relationships with local businessmen, government officials, and foreign multinationals' China operations. Such experience has helped Paolo navigate the intricacies of Chinese culture and business environment and design the most appropriate route to achieve an investment goal in Mainland China.

From 2002 through 2005, Mr. Giancane worked as a Vice President at UniCredit Corporate & Investment Banking in the Milan office advising multinational clients including Telecom Italia, Enel, Heineken and Autostrade (Italy's largest highway operator) in cross-border transactions.

Prior to joining UniCredit in 2002, Paolo Giancane worked at Lehman Brothers in Milan, London and New York in the corporate finance and leveraged finance groups. He was exposed to M&A, equity and debt transactions in Continental Europe, United States and emerging markets.

Mr. Giancane holds a BA Degree from Bocconi University in Milan and a MSc in Finance from London Business School. He attended executive management programs at Imperial College in London and the Spanish Institute of Energy in Madrid. He has also spoken at various conferences organized by the UniCredit Group in the field of mergers & acquisitions to and from China and given interviews to economic magazines and news channels on financial and economic topics.

Paolo Giancane holds the Chartered Financial Analyst (CFA) designation which - according to CFA Institute - has become the most respected and recognized investment credential in the world.

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PREREQUISITES

Previous attendance of Corporate Finance and/or Macroeconomy courses is strongly advised for students willing to enroll.

SUBJECT DESCRIPTION

This course is intended to help students understand how professional managers manage their clients' money to derive the maximum benefit from what they earn. It mixes investment instruments and capital markets with theoretical detail on evaluating investments and opportunities to satisfy risk-return objectives, in a global investment context. Blending theory with practical examples, the program outlines the most important issues surrounding modern investment analysis & portfolio management.

LEARNING OBJECTIVES

Investment professionals require broad-based financial skills: they not only must possess an extensive understanding of the financial markets, including structure, organization, efficiency, portfolio management, risk and return, and planning and construction, but they must also have a strong sense of how to evaluate industries and companies prior to engaging in an analysis of a specific stock.

The objective of this course is to provide a comprehensive overview of the fundamental principles of investment analysis (for both traditional asset classes and alternative investments) and portfolio management. We will do so outlining the entire flow of the portfolio management process, from formulating an Investment Policy Statement to portfolio construction, trade execution, and monitoring and rebalancing of a portfolio.

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	25.0 hours
Discussions	4.0 %	5.0 hours

Exercises in class, Asynchronous sessions, Field Work	8.0 %	10.0 hours
Group work	4.0 %	5.0 hours
Individual studying	64.0 %	80.0 hours
TOTAL	100.0 %	125.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

The first part of the course focuses on the process of private wealth management and the preparation of an "Investment Policy Statement" or "IPS" for the individual investor. The IPS is a fundamental reference in the investment process of clients' assets: it allows the manager to identify needs, goals, and risk tolerance of the investor, as well as limitations under which the investment portfolio must operate. The ultimate goal is to formulate an investment strategy to tax-efficiently match such potentially diverging requirements.

We will then address the concepts and practices relevant to prepare the investment policy statement for institutional investors (in this course we will narrow our focus on pensions plans, insurance companies and banks). Additional attention will be given to the practice of asset/liability management and its implications for asset allocation and risk management.

- Source of wealth, measure of wealth, and stages of life and their impact on an individual investor's risk tolerance
- Analysis of different investors' personality types
- The process of creating an investment policy statementThe appropriate strategic asset allocation for an individual investor's specific investment goals and constraints: case studies
- The importance of "Human Capital" as part of the lifetime financial advice

Book Chapters: Managing Investment Portfolios: A Dynamic Process - Chapters 1-2 (See Bibliography)
Article: Lifetime Financial Advice: Human Capital, Asset Allocation, and Insurance (Research Foundation of CFA Institute) (ced)

SESSION 2 (LIVE IN-PERSON)

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- Analysis of different investors' personality types
- The process of creating an investment policy statement

- The appropriate strategic asset allocation for an individual investor's specific investment goals and constraints: case studies
- The importance of "Human Capital" as part of the lifetime financial advice

SESSION 3 (ASYNCHRONOUS)

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- The process of creating an investment policy statement
- The appropriate strategic asset allocation for an individual investor's specific investment goals and constraints: case studies
- The importance of "Human Capital" as part of the lifetime financial advice

SESSION 4 (ASYNCHRONOUS)

The first part of the course focuses on the process of private wealth management and the preparation of an "Investment Policy Statement" or "IPS" for the individual investor. The IPS is a fundamental reference in the investment process of clients' assets: it allows the manager to identify needs, goals, and risk tolerance of the investor, as well as limitations under which the investment portfolio must operate. The ultimate goal is to formulate an investment strategy to tax-efficiently match such potentially diverging requirements.

We will then address the concepts and practices relevant to prepare the investment policy statement for institutional investors (in this course we will narrow our focus on pensions plans, insurance companies and banks). Additional attention will be given to the practice of asset/liability management and its implications for asset allocation and risk management.

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- Analysis of different investors' personality types
- The process of creating an investment policy statement
- The appropriate strategic asset allocation for an individual investor's specific investment goals and constraints: case studies
- The importance of "Human Capital" as part of the lifetime financial advice

SESSION 5 (LIVE IN-PERSON)

- Defined-benefit versus defined-contribution funds
- Investment objectives
- Risk tolerance

- Constraints
- Investment policy statements for pension funds, insurance companies and banks
- Asset/Liability imbalance and the concept of expanded balance sheet

Book Chapters: Managing Investment Portfolios: A Dynamic Process - Chapter 3 (See Bibliography)

SESSION 6 (LIVE IN-PERSON)

- Defined-benefit versus defined-contribution funds
- Investment objectives
- Risk tolerance
- Constraints
- Investment policy statements for pension funds, insurance companies and banks
- Asset/Liability imbalance and the concept of expanded balance sheet

SESSION 7 (LIVE IN-PERSON)

Once completed the Investment Policy Statement for its client, the manager will start building capital market expectations, as an investment decision is not simply a binary "buy" or "sell," but more so a continuous spectrum. Investment analysis and valuation information helps determine whether to have relatively more or relatively less of a given asset class. Valuation is not just a matter of finding a number; rather, it is trying to bracket a "range of reasonableness", accepting the fact that there is inevitably a range of uncertainty in any investment decision.

- The role of capital market expectations in the portfolio management process
- Formal tools: statistical analysis, discounted cash flows models, the risk premium approach, and financial equilibrium models
- The phases of the business cycles and their impact on short-term and long-term capital market returns
- The Taylor Rule and central bank behavior

Book Chapters: Managing Investment Portfolios: A Dynamic Process - Chapter 4 (See Bibliography)

SESSION 8 (LIVE IN-PERSON)

Once completed the Investment Policy Statement for its client, the manager will start building capital market expectations, as an investment decision is not simply a binary "buy" or "sell," but more so a continuous spectrum. Investment analysis and valuation information helps determine whether to have relatively more or relatively less of a given asset class. Valuation is not just a matter of finding a number; rather, it is trying to bracket a "range of reasonableness", accepting the fact that there is inevitably a range of uncertainty in any investment decision.

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- Formal tools: statistical analysis, discounted cash flows models, the risk premium approach, and financial equilibrium models
- The phases of the business cycles and their impact on short-term and long-term capital market returns
- The Taylor Rule and central bank behavior

SESSION 9 (LIVE IN-PERSON)

Once completed the Investment Policy Statement for its client, the manager will start building capital market expectations, as an investment decision is not simply a binary "buy" or "sell," but more so a continuous spectrum. Investment analysis and valuation information helps determine whether to have relatively more or relatively less of a given asset class. Valuation is not just a matter of finding a number; rather, it is trying to bracket a "range of reasonableness", accepting the fact that there is inevitably a range of uncertainty in any investment decision.

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- Formal tools: statistical analysis, discounted cash flows models, the risk premium approach, and financial equilibrium models
- The phases of the business cycles and their impact on short-term and long-term capital market returnsThe Taylor Rule and central bank behavior

SESSION 10 (LIVE IN-PERSON)

Once completed the Investment Policy Statement for its client, the manager will start building capital market expectations, as an investment decision is not simply a binary "buy" or "sell," but more so a continuous spectrum. Investment analysis and valuation information helps determine whether to have relatively more or relatively less of a given asset class. Valuation is not just a matter of finding a number; rather, it is trying to bracket a "range of reasonableness", accepting the fact that there is inevitably a range of uncertainty in any investment decision.

- The role of capital market expectations in the portfolio management process
- Formal tools: statistical analysis, discounted cash flows models, the risk premium approach, and financial equilibrium models
- The phases of the business cycles and their impact on short-term and long-term capital market returns
- The Taylor Rule and central bank behavior

SESSION 11 (ASYNCHRONOUS)

- Major approaches to economic forecasting
- Economic information as a tool to forecasting asset return
- How to suggest and to justify changes in global market portfolios based on expected changes in macroeconomic factors
- The role of developing countries, especially BRICs, in a global invested portfolio

Book Chapters: Managing Investment Portfolios: A Dynamic Process - Chapter 4 (See Bibliography)

SESSION 12 (LIVE IN-PERSON)

- Major approaches to economic forecasting
- Economic information as a tool to forecasting asset return
- How to suggest and to justify changes in global market portfolios based on expected changes in macroeconomic factors
- The role of developing countries, especially BRICs, in a global invested portfolio

SESSION 13 (LIVE IN-PERSON)

MID-TERM EXAM

SESSION 14 (LIVE IN-PERSON)

After having duly reported in the investment policy statement the client's risk and return objectives as well as specific constraints, and formulated capital market expectations, the manager's next task is to match both aspects and to determine the relevant strategic asset allocation. Minimum and maximum permissible asset class weights can be used as a risk control mechanism.

- Strategic versus tactical asset allocation
- Asset-only and asset/liability management approaches to asset allocation
- Selection and justification of an appropriate set of asset classes for different types of investor: case studies
- Major steps pertaining to the establishment of an appropriate asset allocation
- The case for international diversification

Book Chapters: Managing Investment Portfolios: A Dynamic Process - Chapter 5 (See Bibliography)

SESSION 15 (LIVE IN-PERSON)

After having duly reported in the investment policy statement the client's risk and return objectives as well as specific constraints, and formulated capital market expectations, the manager's next task is to match both aspects and to determine the relevant strategic asset allocation. Minimum and maximum permissible asset class weights can be used as a risk control mechanism.

- Strategic versus tactical asset allocation
- Asset-only and asset/liability management approaches to asset allocation
- Selection and justification of an appropriate set of asset classes for different types of investor: case studies
- Major steps pertaining to the establishment of an appropriate asset allocation
- The case for international diversification

SESSION 16 (LIVE IN-PERSON)

After having duly reported in the investment policy statement the client's risk and return objectives as well as specific constraints, and formulated capital market expectations, the manager's next task is to match both aspects and to determine the relevant strategic asset allocation. Minimum and maximum permissible asset class weights can be used as a risk control mechanism.

- Strategic versus tactical asset allocation
- Asset-only and asset/liability management approaches to asset allocation
- Selection and justification of an appropriate set of asset classes for different types of investor: case studies
- Major steps pertaining to the establishment of an appropriate asset allocation
- The case for international diversification

SESSION 17 (LIVE IN-PERSON)

After having duly reported in the investment policy statement the client's risk and return objectives as well as specific constraints, and formulated capital market expectations, the manager's next task is to match both aspects and to determine the relevant strategic asset allocation. Minimum and maximum permissible asset class weights can be used as a risk control mechanism.

- Strategic versus tactical asset allocation
- Asset-only and asset/liability management approaches to asset allocation

- Selection and justification of an appropriate set of asset classes for different types of investor: case studies
- Major steps pertaining to the establishment of an appropriate asset allocation
- The case for international diversification

SESSION 18 (LIVE IN-PERSON)

In this part of the course we will dig into the basic features of the investment management process for both a fixed-income and an equity portfolio. In particular, we will first analyze the selection of an appropriate benchmark and specific portfolio management strategies for a fixed-income portfolio. Afterwards, the role played by equities in an investment portfolio and the three major approaches to manage equity portfolios.

- Selection of an appropriate benchmark for a fixed-income portfolio
- Pure bond indexing, enhanced indexing and active investing
- Classical immunization strategy and cash flow matching
- Selection of an equity investment approach based on the investor's IPS
- Alternative methods to establishing passive exposure to an equity market
- Style analysis and equity style box analysis
- Sell actions performed by active investors

SESSION 19 (LIVE IN-PERSON)

- Selection of an appropriate benchmark for a fixed-income portfolio
- Pure bond indexing, enhanced indexing and active investing
- Classical immunization strategy and cash flow matching
- Selection of an equity investment approach based on the investor's IPS
- Alternative methods to establishing passive exposure to an equity market
- Style analysis and equity style box analysis
- Sell actions performed by active investors

SESSION 20 (LIVE IN-PERSON)

- Selection of an appropriate benchmark for a fixed-income portfolio
- Pure bond indexing, enhanced indexing and active investing
- Classical immunization strategy and cash flow matching
- Selection of an equity investment approach based on the investor's IPS
- Alternative methods to establishing passive exposure to an equity market
- Style analysis and equity style box analysis
- Sell actions performed by active investors

SESSION 21 (LIVE IN-PERSON)

- Selection of an appropriate benchmark for a fixed-income portfolio
- Pure bond indexing, enhanced indexing and active investing
- Classical immunization strategy and cash flow matching
- Selection of an equity investment approach based on the investor's IPS
- Alternative methods to establishing passive exposure to an equity market
- Style analysis and equity style box analysis
- Sell actions performed by active investors

Book Chapters: Managing Investment Portfolios: A Dynamic Process - Chapters 6-7 (See Bibliography)

SESSION 22 (LIVE IN-PERSON)

- Selection of an appropriate benchmark for a fixed-income portfolio
- Pure bond indexing, enhanced indexing and active investing
- Classical immunization strategy and cash flow matching
- Selection of an equity investment approach based on the investor's IPS
- Alternative methods to establishing passive exposure to an equity market
- Style analysis and equity style box analysis
- Sell actions performed by active investors

SESSION 23 (LIVE IN-PERSON)

Alternative investments as a different group of investments provide return enhancement and/or risk reduction benefits to a portfolio comprised of traditional asset classes only, i.e. stocks and bonds. Our analysis will address real estate, private equity, commodities and distressed securities investments.

- Common features of alternative investments
- Return enhancement and/or risk diversification profile of: Direct and indirect investments in real estate
- Private equity (venture capital versus buy-out funds)

SESSION 24 (ASYNCHRONOUS)

COURSE RECAP / MOCK EXAM

SESSION 25 (ASYNCHRONOUS)

FINAL EXAM

EVALUATION CRITERIA

Session participation: 30%

Attendance and punctuality are mandatory. Students are expected to come prepared and participate actively and voluntarily during lectures.

Mid-term examination: 30%

Because of the highly technical nature of most of the material, it is important to keep up by working the textbook and the exercises as well as the case studies provided during the course. The mid-term individual 80-minute examination, around session 13, will cover up to session 12. The use of notes or textbooks is not allowed during the preparation of this assignment.

Final exam: 40%

Open-book, multiple-choice, written examination. The final exam, a 80-minute test, will be worked out individually and will cover the all sessions of the course. Minimum grade at the final exam to pass the course is 4/10.

criteria	percentage	Learning Objectives	Comments
Final Exam	40 %		
Intermediate Tests	30 %		

Class Participation	30 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July. Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year. The Extraordinary Call Evaluation criteria will be subject to the following rules:

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? The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

? Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0). After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course).

Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

! Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- John L. Maginn, Donald L. Tuttle ,Dennis W. McLeavey, Jerald E. Pinto. (2007). *Managing Investment Portfolios: A Dynamic Process.* 3rd edition. John Wiley & Sons Inc. ISBN 9788126564446 (Printed)

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INVESTMENT BANKING

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 INBA-NBA.1C.n.OPT.M.A

Area Finance

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **ALEXANDER DE GROOT**

E-mail: adegroot@faculty.ie.edu

Prof. Dr. Alexander de Groot holds a PhD in Finance and a Master in Research from IE Business School as well as an MBA from Vlerick Business School (Catholic University of Louvain, Belgium) and a BBA from Nyenrode, The Netherlands University of Business. He has taught at the University of London and the University of Gibraltar.

He started his career in investment banking in fixed income derivatives in London and then founded KBC-Petercam Derivatives in 1992, which became one of the leading equity derivatives trading houses in Europe. Subsequently he became managing partner and member of the management committee of Petercam, the largest Belgian investment bank, responsible for all Financial Markets, M&A and Risk Management.

adegroot@faculty.ie.edu

PREREQUISITES

- Students should have completed successfully an introductory course in corporate finance and should be familiar with concepts such as time value of money.
- Willingness to learn new methods and work with databases like Bloomberg.
- Good working knowledge of Excel.
- Strong quantitative skills would give an advantage in the course.

SUBJECT DESCRIPTION

This course delves into the structure, management and practices of investment banking (IB)—from larger more universal players to boutique operations. It examines the business activities of fixed income and equities trading, mergers and acquisitions, financing and investment; and, the creation of value through financial advisory services. It looks into the business practices of private equity, hedge funds and trading operations; and, the role of each in facilitating investment, the deployment of capital and the changing face of risk-taking activities. The course emphasizes the role of the IB financial advisor and his/her importance in securing and facilitating IB business opportunities. This course is about the businesses of investment banking.

Importantly, through our class discussions and case-study work, each student will bring the answers to these questions into personal focus. Students are exposed to both the diagnostic and prescriptive processes of IB allowing them to partake in the financial advisory process; and, understand what it means to be an IB practitioner or valued client.

LEARNING OBJECTIVES

The main objective of the course is to provide students with the necessary theoretical and conceptual tools used in investment banking. This course will provide an introduction and general understanding of investment banking activities and the mechanics and financial analysis required to value, negotiate and successfully close transactions.

The course will provide the intellectual framework used in the investment banking process: financial analysis, valuation and the mechanics of deal structuring and trading. Other learning objectives include analysis and valuation in M&A and LBO settings and understanding the sources of capital in the context of these transactions.

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	80.0 %	60.0 hours
Discussions	0.0 %	0.0 hours
Exercises in class, Asynchronous sessions, Field Work	13.33 %	10.0 hours
Group work	6.67 %	5.0 hours
Individual studying	0.0 %	0.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Fixed Income Valuation Techniques: Overview

Book Chapters: Zvi Bodie, Alex Kane & Alan Marcus. (2022). Essentials of Investments - Ch. 10 & 11 (IE Library)

SESSION 2 (LIVE IN-PERSON)

Fixed Income Valuation Techniques: Overview

Book Chapters: Zvi Bodie, Alex Kane & Alan Marcus. (2022). Essentials of Investments - Ch. 10 & 11 (IE Library)

SESSION 3 (LIVE IN-PERSON)

Fixed Income Valuation Techniques: Case study

To be provided

SESSION 4 (LIVE IN-PERSON)

Equities Valuation Techniques: Overview

Book Chapters: Zvi Bodie, Alex Kane & Alan Marcus. (2022). Essentials of Investments - Ch. 13 (IE Library)

SESSION 5 (LIVE IN-PERSON)

Equities Valuation Techniques: Case study

To be provided

SESSION 6 (LIVE IN-PERSON)

Comparable Company Analysis

Book Chapters: Joshua Rosenbaum & Joshua Pearl. (2021). Investment Banking - Valuation, Leveraged Buyouts, and Mergers & Acquisitions - Ch.1 (IE Library)

SESSION 7 (LIVE IN-PERSON)

Precedent Transactions Analysis

Book Chapters: Joshua Rosenbaum & Joshua Pearl. (2021). Investment Banking - Valuation, Leveraged Buyouts, and Mergers & Acquisitions - Ch. 2 (IE Library)

SESSION 8 (LIVE IN-PERSON)

Discounted Cash Flow Analysis

Book Chapters: Joshua Rosenbaum & Joshua Pearl. (2021). Investment Banking - Valuation, Leveraged Buyouts, and Mergers & Acquisitions - Ch. 3 (IE Library)

SESSION 9 (LIVE IN-PERSON)

Leveraged Buyouts

Book Chapters: Joshua Rosenbaum & Joshua Pearl. (2021). Investment Banking - Valuation, Leveraged Buyouts, and Mergers & Acquisitions - Ch. 4 (IE Library)

SESSION 10 (LIVE IN-PERSON)

Leveraged Buyouts Analysis

Book Chapters: Joshua Rosenbaum & Joshua Pearl. (2021). Investment Banking - Valuation, Leveraged Buyouts, and Mergers & Acquisitions - Ch. 5 (IE Library)

SESSION 11 (LIVE IN-PERSON)

Company Valuation: Case study

To be provided

SESSION 12 (LIVE IN-PERSON)

Sell-Side M&A

Book Chapters: Joshua Rosenbaum & Joshua Pearl. (2021). Investment Banking - Valuation, Leveraged Buyouts, and Mergers & Acquisitions - Ch. 6 (IE Library)

SESSION 13 (LIVE IN-PERSON)

Buy-Side M&A

Rosenbaum, Pearl Ch 7

Book Chapters: Joshua Rosenbaum & Joshua Pearl. (2021). Investment Banking - Valuation, Leveraged Buyouts, and Mergers & Acquisitions - Ch. 7 (IE Library)

SESSION 14 (LIVE IN-PERSON)

Rehearsal

SESSION 15 (LIVE IN-PERSON)

Final Exam

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		
Individual Presentation	20 %		
Group Presentation	20 %		
Class Participation	10 %		

RE-SIT / RE-TAKE POLICY
RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).
- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)
- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.
- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.
- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- Zvi Bodie, Alex Kane & Alan Marcus. (2022). *Essentials of Investments.* 12th. McGraw Hill. ISBN 9781260772166 (Printed)
- Joshua Rosenbaum & Joshua Pearl. (2021). *Investment Banking - Valuation, Leveraged Buyouts, and Mergers & Acquisitions.* 3rd. Wiley. ISBN 9781119823421 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct [here](). The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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LEAN THINKING

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 LT-NBA.1C.n.OPT.M.A

Area Operations and Business Analytics

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **FELIPE AMADO QUINTANA NAVARRO**

E-mail: faquintana@faculty.ie.edu

FELIPE AMADO QUINTANA NAVARRO

Academic background

- Master in Technology and Communication for teaching by UNED (2013-2014)
- Master in Logistics, Purchasing and Stocks Management by AERCE (2003)
- MBA by IE Business School (1999-2000)
- Industrial engineer by Univesity of Las Palmas de Gran Canaria (1992-1998)

Professional experience

- MDS (since 2014). Operations and SCM consultant & Customer Experience and Lean Thinking consultant.
- Aguas Minerales de Firgas (2009-2016): Operations & Supply Chain Manager. New Products Development Responsible (Canary Islands. Spain).
- Robert Bosch (2004-2009): Project Manager for Bosch Car Service Spain and Portugal (Madrid-Lisboa-Kalsruhe)
- LVMH (2000-2004): Operations Responsible for Perfumes Loewe (Madrid-Paris)

Academic experience

- IE Adjunct Professor since 2004: Operations Management, Supply Chain Management, Customer Experience Management and Lean Thinking.
- IE Faculty trainer since 2008
- IE LBE Program Faculty since 2015: Leadership in Blended Education Program for higher education professors.

Professor contact and information

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- e-mail: faquintana@faculty.ie.edu

- Twitter: @faoquintana
- Skype: felipe.quintana.navarro
- Linkedin: Felipe
    Email: faquintana@faculty.ie.edu
    telephone: +34 609402509

PREREQUISITES

No special prerequisites are needed to attend this course. All students are welcome to discover together the fascianting world of Lean Thinking.

SUBJECT DESCRIPTION

We can define Lean Thinking as a philosophy of working which main objective is to maximize value for Customers minimizing waste during the process.

This business strategy was created by Toyota in a manufacturing environment (Lean Manufacturing). Toyota Production System was created as a smart analysis of the possible waste in the car manufacturing line. At the same time, Toyota developed several tools to reduce all kind of identified waste. The results of this philosophy were outstanding and guide Toyota to leadership in its sector.

The initial concept was later extended to Service Companies (Lean Service) and also to other business sectors (Lean Banking, Lean Tourism, Lean Health Care, Lean Education, Lean Government, Lean Construction, etc.). Even new products and services development were captivated by the principles of Lean to create "Lean Design Thinking".

A new trend in Lean is to involve all the areas of the organizations and establish Lean Thinking as a new way of working and getting differentiation.

There are two components of the formula Lean Thinking we are going to explore during this course:

- Maximizing the Value for Customers: It is mandatory for the companies to be Customer oriented and to identify needs and to analyse Customer Satisfaction to offer the right product/service at the right place, and in time. At the same time we must get differentiation through Customer Experience, and try to understand customers' satisfaction and meet the "Value for money" customers are willing to pay.
- Minimizing Waste: "Muda" or Waste is everything in the process not adding value for customers, and it is very important to analyse all kind of waste (unnecessary movement, defects, lost time, overproduction, stocks, non used talent, etc.). Once identified waste, we need to develop a complete "Lean Tools Kit" to reduce or eliminate them.
    Strategic Management, Marketing, Operations Management and Human Resources Management play an important role in the definition and implementation of Lean Thinking, so integration all among the organization is needed.

LEARNING OBJECTIVES

- Discover all variants of Lean Thinking and its principles which guide companies, not only in the

strategic definition of Lean Thinking, but also during the implementation of this philosophy.
- Lean Manufacturing
- Lean Sercice
- Lean apply to specific business sectors (Construction, Banking, HealthCare, Government, Tourism). Identify Value Proposition and its link to Satisfaction and Quality Service.
- Identify and classify Waste and all all the tools and technic to eliminate them (Lean Tools Kit)
- Study the propper Change Management to transform a traditional Company into a Lean Thinking Organisation.
- Study the latest applications of Lean Thinking: Lean Design and Lean Start-ups.
- Analyze the appropiate process, steps and best practices to implement Lean Thinking
- Build an organisation oriented to Lean Thinking and analyze the best Human Resource Strategy

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	26.67 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	26.67 %	20.0 hours
Group work	20.0 %	15.0 hours
Individual studying	6.67 %	5.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)
INTRODUCTION. LEAN MANUFACTURING: STARTING POINT AND HISTORY
- Introduction.
- Pecha Kucha Presentation by Adjunct Professor Felipe Quintana: Lean Thinking overview
- Lean Thinking Formula:
    - Maximizing Value for customer
    - with the minimum waste
- Analysing the Toyota Production System: The beginning of Lean Manufacturing.

SESSION 2 (LIVE IN-PERSON)

FIRST COMPONENT OF THE LEAN FORMULA: MAXIMIZING THE VALUE FOR THE CUSTOMER

- Dimensions of Value
- Value creator and value destructor
- Best practices in Customer centric organizations
- From Push to Pull Strategy as Lean Thinking requirement
- Mass Customization: The four faces of Mass Customization
- Customer Experience as a key factor to create Customer Value

During this session we shall do a live team-work activity related to "Customer Value". All the instruction will be given at the beginning of the session and every team will have time to prepare and present this activity during this double session. Read carefully all the assigned lecture before this double session.

Technical note & tutorials: Focus on Customers (MKS020002-U-ENG-WOD)

Article: Cracking the Code of Mass Customization (HBS SMR315-PDF-ENG)

Article: The great enemy of Customer Centricity: Business Silo mentality (LinkedIn)

SESSION 3 (LIVE IN-PERSON)

FIRST COMPONENT OF THE LEAN FORMULA: MAXIMIZING THE VALUE FOR THE CUSTOMER

- Value: The first law of Customer Service: Satisfaction = Perception - Expectations
- Ways to measure Customer Satisfaction

Article: Satisfaction = Perception – Expectations The Best Kept Secret & First Rule of Customer Service (LinkedIn)

Article: My Take on Customer Feedback 'Happy-or-Not' Panels (LinkedIn)

SESSION 4 (LIVE IN-PERSON)

SECOND COMPONENT OF THE LEAN FORMULA: MINIMIZING WASTE. WASTE DEFINITION AND LEAN TOOLS KIT TO REDUCE IT

- Types of waste in industry: MUDA, MURA and MURI. Lean Tools Kit to reduce waste, part 1:
    - JIT (Just in Time)/Pull Strategy
    - 5S
    - Poka Yokes
    - Kaizen
    - Kanban
    - Jidoka
    - VSM (Value Stream Mapping)
    - Solving Proble Tools

Technical note & tutorials: Types of waste in industry: classification and programmes to eliminate them (OPE020018-U-ENG-WOD)

Technical note: A Glossary of Lean Terms (HBS UV1279-PDF-ENG)

SESSION 5 (LIVE IN-PERSON)

SECOND COMPONENT OF THE LEAN FORMULA: MINIMIZING WASTE. WASTE DEFINITION AND LEAN TOOLS KIT TO REDUCE IT

- Lean Tools Kit to reduce waste, part 2:
  - SRM (Supplier Relationship Management)
  - Keiretsu
  - Lean Six Sigma
  - Principles of the waiting lines
  - Heijunka
  - Quality at the source
  - Total Quality Management

Multimedia Material: Top 25 Lean Tools (Lean Production)

SESSION 6 (LIVE IN-PERSON)

Lean Tools Kit to reduce waste. Part 3:

- TPM (Total Productive Maintenance)
- Lay-out Study and Spaghetti Diagram
- OPT (Optimized Production Technology)
- ERP (Enterprise Resources Planning)
- AMT (Advances Manufacturing Technology)
- SMED (Set-up and Change over reduction)
- GEMBA (Genchi Gembutsu: Go&See)
- Cells Manufacturing and lay-out Reduction)
- Lean Six Sigma
- Keiretsu
- Others

At the end of this double session a 25 questions test will be done. Read the assigned lecture before this session and pay attention during this double session in order to be ready for this test.

SESSION 7 (LIVE IN-PERSON)

Midterm Exam

- 20 test questions
- 10 short questions to be answered in approximately 5 lines

SESSION 8 (ASYNCHRONOUS)

LEAN CONSUMPTION. LEAN APPLIED TO SERVICE INDUSTRIES AND BUSINESS SECTORS

- Lean consumption
- Lean Service best practice: Southwest Airlines

Article: Lean Consumption (HBS R0503C-PDF-ENG)
Practical Case: Southwest Airlines in Baltimore (HBS 602156-PDF-ENG)

SESSION 9 (LIVE IN-PERSON)

LEAN CONSUMPTION. LEAN APPLIED TO SERVICE INDUSTRIES AND BUSINESS SECTORS

- Lean consumption
- Lean applied to business sectors:
    - Lean Tourism
    - Lean Banking
    - Lean Construction
    - Lean Health-Care
    - Lean Education
    - Lean Government
    - Lean Hospitality

Teamwork Presentations. Every team will present a 10 minutes presentation about a service industry. Professor will give all the indications to each group from the very beginning of the course.

SESSIONS 10 - 11 (ASYNCHRONOUS)

Fieldwork at a company to analyze a best practice in Lean Thinking. Activity to be done in teams: Lean Thinking at IKEA.

Professor will give all the indications to prepare this teamwork activity.

SESSION 12 (LIVE IN-PERSON)

LEAN THINKING IMPLEMENATION. LEAN THINKING APPLICATIONS AND NEW TRENDS INSPIRED IN LEAN MANAGEMENT

- Agile Methodologies
- Design Thinking
- Lean Start-ups

Article: Why the Lean Start-Up Changes Everything (HBS R1305C-PDF-ENG)
Technical note: Agile Methodologies and Organizational Agility (HBS IES743-PDF-ENG)
Article: Design Thinking Comes of Age (HBS R1509D-PDF-ENG)

SESSION 13 (LIVE IN-PERSON)

LEAN THINKING IMPLEMENATION. LEAN THINKING APPLICATIONS AND NEW TRENDS INSPIRED IN LEAN MANAGEMENT

- Agile Methodologies
- Design Thinking
- Lean Start-ups

SESSION 14 (LIVE IN-PERSON)

PECHA KUCHA PRESENTATIONS. COURSE WRAP UP

Every student will present her/his Pecha Kucha Presentation.
Summary and Wrap up.

SESSION 15 (LIVE IN-PERSON)

PECHA KUCHA PRESENTATIONS. COURSE WRAP UP

Every student will present her/his individual presentation in a topic selected by her/him: A Pecha Kucha Presentation: 20 slides temporized to 20 seconds (a 6 minutes and 40 seconds presentation).

Summary and Wrap up.

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Intermediate Tests	25 %		During Session 7
Individual Work	25 %		During Session 14&15
Group Presentation	25 %		During Session 9 (12.5%) and 10&11 (12.5%)
Class Participation	25 %		10% attentance/15% Class Participation

RE-SIT / RE-TAKE POLICY

Class Participation (25%)

Class participation will be graded separately for each session. 10% is attendance and 15% is class participation during the face-to-face sessions and forums.

Team Work (25%)

There are two team work activities contributing each one 50% of this evaluation criteria:

- 12.5%: A 10 minutes Presentation on the topic assigned by professor to each group. This teamwork activity will take place on Session 9. Professor will give every group a Guide to prepare this presentasion.
- 12.5%: Fieldwork to be done during Session 10&11 to see a best practice in Lean Thinking implementation: LT at IKEA.

Intermediate test (25%)

A 20 test questions and 10 written questions to be done during session 7.

Final Report (Individual Work) Pecha Kucha Presentation (25%)

Every student will prepare a Pecha Kucha Presentation (20 images temporized to 20 seconds: 6 minutes and 40 seconds) in a free selection topic, and will present it in Session 14 to 15. Adjunct Professor will introduce this format of presentation, very useful to transmit ideas, in Session 1. The aspects evaluated will be: 35% research on the topic, 35% messages during the presentation, 10% oratory, 10% creativity and 10% images selection.

RE-SIT / RE-TAKE POLICY

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Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and

must directly re-enroll in the course during the next Academic Year).

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BIBLIOGRAPHY
Recommended

- James P. Womack & Saniel T. Jones. (2003). *Lean Thinking. Banish waste and create wealth in your corporation..* Business and Economics. ISBN 0743249275 (Digital)
- Jeffrey Liker. *The toyota way: 14 Management Principles from the World's greatest manufacturer.* McGraw Hill. ISBN 0071392319 (Digital)
- Dabashis Sarkar.. (2007). *Lean for service organizations: a holistic approach for achieving operational excellence and improve.* ASQ Quality Press. ISBN 0873897242 (Digital)

BEHAVIOR RULES

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MARKETING & VIDEOGAMES

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 M&V-NBA.1C.n.OPT.M.A

Area Marketing and Communication

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JUAN MANUEL ALONSO MELO**

E-mail: juanmanuela@faculty.ie.edu

Juan Manuel Alonso began his studies in Universidad Pontificia Comillas, where he succedeed in two degrees: Law & Business Administration. Always linked to Marketing, Juan Manuel has managed brands primarily in the Consumer Goods industry, such as Head & Shoulders (P&G), Coco Pops-Frosties (Kellogg's) and Scottex (Kimberly Clark) and Cargill

In addition to this, Juan Manuel is an permanent teacher in several Universities and Business Schools with experience in subjects that cover Branding, Marketing and Sales and a demonstrated passion for Entertainment.

juanmanuela@faculty.ie.edu

PREREQUISITES

Previous basic Marketing knowledge (4 P's traditional methodology) will be helpful

SUBJECT DESCRIPTION

The Videogame sector has been left aside for decades as a kids&teen sector not worthy of analysis. In this subject, the professor will explain the current videogaming situation, trend analysis, innovation process and main marketing tools. On top of it, several guest speakers from major videogame players (Xbox, Playstation, Nintendo, etc) will show their own part of the picture.

LEARNING OBJECTIVES

At the end of the subject, the student will have obtained the necessary theoretical knowledge to manage brands and identify latest trends in the Videogame industry. Additionally, the student will be able to make decisions at a strategic level to properly prioritize available resources.

To balance this knowledge, the student will have learned , through case studies, to face real life situations and critical issues related to the day to day life of a Videogame Product / Brand Manager , his/her relationship with agencies and the ability to search info, use the most relevant studies available and identify potential research.

The main objective of the course is to show students the different phases that compose Videogame brand management, both at a strategic and an operational level, as well as the use of sources and tools that allow the right decision taking.

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	26.67 %	20.0 hours
Discussions	0.0 %	0.0 hours
Exercises in class, Asynchronous sessions, Field Work	0.0 %	0.0 hours
Group work	26.67 %	20.0 hours
Individual studying	46.67 %	35.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Introduction to Marketing and Branding in the Videogame industry

SESSION 3 (LIVE IN-PERSON)

E-sports: the rise and fall

SESSION 4 (LIVE IN-PERSON)

Industry Leader Practitioner - Digital Content Director Telefonica Spain

SESSION 5 (ASYNCHRONOUS)

Pre-reading: Offline and online communication

SESSION 6 (LIVE IN-PERSON)

Offline and online communication

Industry Leader Practitioner - Xbox Marketing Director Spain

SESSION 7 (LIVE IN-PERSON)

Brands and Videogame production

SESSION 8 (LIVE IN-PERSON)

Industry Leader Practitioner - Playstation Creative Director

SESSION 9 (LIVE IN-PERSON)

Videogames and Sustainability

SESSION 10 (ASYNCHRONOUS)

Industry Leader Practitioner - Hobbyconsolas Editor in Chief Spain

SESSION 11 (LIVE IN-PERSON)

Videogames: the future in Virtual Reality (pre-reading)

SESSION 12 (LIVE IN-PERSON)

Industry Leader Practitioner - Marketing Director Lenovo Virtual Reality

SESSION 13 (ASYNCHRONOUS)

Videogames and PR

SESSION 14 (LIVE IN-PERSON)

Industry Leader Practitioner - PR Lead Electronic Arts Spain

SESSION 15 (LIVE IN-PERSON)

Business case

EVALUATION CRITERIA

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

As a result of IE's ´liquid learning´ model, all students must abide to the attendance policy for AY 2021-22 where physical (in-person) attendance to class is compulsory for all regular Face-to-Face courses. Those students who, due to exceptional cases (that have been pre-approved by IE), are connecting remotely to class sessions and not physically in the classroom are required to fully connect their camera and microphone at all times , and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Ø Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

Ø It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

! Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		
Final Exam	0 %		
Individual Work	40 %		
Class Participation	10 %		

RE-SIT / RE-TAKE POLICY

BIBLIOGRAPHY

Compulsory

- David Edery and Ethan Mollick. (2010). *Changing the Game: How Video Games Are Transforming the Future of Business.* 1st edition. Financial Times Prentice Hall.

ISBN 9780132171472 (Printed)

 - Morgan Ramsay. (2012). *Gamers at Work: Stories Behind the Games People Play.* 1st. Apress. ISBN 9781430233510 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct [here](). The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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MARKETING STRATEGY FOR DECISION MAKING

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 MSDM-NBA.1C.n.OPT.M.A

Area Marketing and Communication

Number of sessions: 20

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 4.0

Semester:

Category: OPTIONAL

Language: English

Professor: **RAMON DIAZ BERNARDO**

E-mail: RDiaz@faculty.ie.edu

Professor RAMON DIAZ BERNARDO

Ramon Diaz-Bernardo is a full-time Professor of Marketing at IE Business School in Madrid. He holds a degree in Engineering from Universidad de Oviedo (Spain), an MSc in Engineering by the University of Nottingham, an MBA from ESDEN Business School, Madrid, and he received his Ph.D. in Business Administration (Marketing) from IESE Business School in Barcelona.

Professor Diaz-Bernardo is currently the Director of the IE-Travel Club Loyalty Research Centre, a research centre dedicated to investigate the field of customer loyalty. He also serves as Academic Director of the IE-Coursera Marketing Massive Online Open Courses (MOOCs).

Dr Diaz-Bernardo teaches strategic marketing at MBAs, Executive MBAs, Executive Education and In-Company programs at IE Business School. His research and consulting interest is focused in services marketing, and more specifically in Tourism Marketing both in the private side of Tourism (the hospitality and restaurant industry) and in the public side of Tourism (national tourism organizations NTOs and tourism promotion institutions).

Professor Diaz-Bernardo serves regularly as a consultant for the United Nations World Tourism Organization and for both private and public companies and institutions in the Tourism and Hotel Sector in Europe and America.

Dr Diaz-Bernardo is an active member of the Academy of Marketing and the American Marketing Association, where he is a regular contributor at their annual meetings. Furthermore he has been visiting professor at Cornell University (USA), Reykjavik University (Iceland), ESSEC Business School (Paris), INCAE (Costa Rica), Hong Kong Polytechnic (Hong Kong), IAE Business School (Argentina) and Universidad Adolfo Ibáñez (Chile), among other international business schools.

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Edited by Documentation
21th June 2023

PREREQUISITES

SUBJECT DESCRIPTION

Marketing Strategy for Decision Making is a seminar designed to develop the knowledge and application of marketing strategy using a business simulation. Nothing teaches like the real world. Marketing theory is certainly important. But its how each student applies it that makes the real difference. All too often, students have to wait until their first job to get hands-on training. That's a costly way to practice.

Why using a simulation to learn Marketing Strategy?

The statistics speak for themselves. The learning retention rate of a standard lecture is only 5%. Give someone the chance to practice by applying their knowledge, and their retention jumps to 75% to 80%. That's a powerful difference, and it's what simulations deliver more than any other learning tool. It's a risk-free platform for testing ideas. No one gets fired and no real budgets are on the line. Yet, participants leave the experience with a more analytical way of thinking, and are more prepared for the real world by testing contingencies and scenarios in advance.

The name of the game here is marketing strategy. Marketing Strategy for Decision Making allows a participant to condense a long-term perspective into a matter of days. You'll see at once how a decision made today will affect the company's value in the years to come. Not just in theory, but through the lessons of real market factors.

From actual market conditions to changing market forces, our Marketing Strategy for Decision Making seminar mirrors the competitive landscape to the last detail. Students apply decisions and see results at once. Nothing else translates ideas into results as quickly or accurately.

Marketing Strategy for Decision Making offers a comprehensive mix of marketing strategy and long-term planning. Through direct competition, participants pilot a company through a competitive landscape in which all of their marketing skills are required. Whether creating a new market or further penetrating an existing one, both strategic and tactical abilities are required: R&D, finance, portfolio management, segmentation and positioning, as well as pricing, promotion and distribution.

Because a winning strategy is nothing without perfect execution, operational decisions play a vital role in the course. From price points to advertising budgets and distribution channels, participants control every aspect of how their plans are realized, and constantly refine their decisions based on actual market performance. It's learning on all levels.

The Marketing Strategy for Decision Making seminar also reinforces a strong focus on competitive thinking and market understanding. Marketing Strategy for Decision Making clearly reflects the impact a sudden competitive move or changing customer needs can have on a company, and encourages teams to look beyond their own corporate walls for insight and ideas.

Just as important, Marketing Strategy for Decision Making always engages students and professionals on a more emotional level. The fast pace and hands-on experience creates an intense energy, making participants eager to apply their new skills. It's a lot of fun, but also hard work. Students and executives find the combination irresistible.

LEARNING OBJECTIVES

The Course Learning Objectives are:

- Understanding the concept of marketing strategy focused on segmentation and positioning.
- Learning how to manage a portfolio of brands when they are competing in an undifferentiated market (first two periods).
- Knowing how and when a company should launch new brands in an existing market to create a differentiation.
- Managing pricing in a competitive and segmented market.
- Understanding well how the sales force should be allocated and managing distribution channels both for existing and new brands.
- Implementing the communication strategy of a brand through advertising campaigns in different stages of its life cycle.
- Learning how to work and make management decisions in a team of very diverse people.

> Finally, it's absolutely mandatory to read the simulation manual carefully before the first online session. The manual is a very easy-to-read description and overview of the market, the products, the customers, and the general environment you are going to face in the simulation.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	20.0 hours
Discussions	20.0 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	20.0 hours
Group work	30.0 %	30.0 hours
Individual studying	10.0 %	10.0 hours
TOTAL	100.0 %	100.0 hours

PROGRAM

SESSIONS 1 - 4 (LIVE IN-PERSON)

Intro. Marketing Strategy. Understanding the market and competing in an undifferentiated market.
New Product Development and the Process of Innovation, Understanding the Customer Needs.

Practical Case: Markstrat for executives: The srategic marketing simulation (MKS010081-U-ENG-WOD)
Complementary Information: Marketing strategy for decision making (A) (MKS040134-A-ENG-PPT)
Complementary Information: Marketing strategy for decision making (B) (MKS040034-B-ENG-PPT)

SESSIONS 5 - 8 (LIVE IN-PERSON)

Marketing a New Product. Go to Market Strategy: from Product Design to New Brand Launching.

Brand Portfolio Management. Managing the Brand Through its Life Cycle in a Segmented and Mature market.

SESSIONS 9 - 12 (LIVE IN-PERSON)

Marketing Radical Innovations.

The Adoption Curve = Innovators, Early Adopters and Followers.

SESSIONS 13 - 16 (LIVE IN-PERSON)

Managing a portfolio of new brands and mature brands: balancing marketing priorities and budget allocation.

Searching for growth and profit in a saturated market.

SESSIONS 17 - 20 (LIVE IN-PERSON)

Specialization vs Diversification: mature markets vs new markets.

Course conclusions and final wrap up.

EVALUATION CRITERIA

The evaluation would be a combination of group performance in the simulation and individual participation as well as a deliverable individual report and a quiz. The entire course is about teamwork and group decision making; that is why the group performance in the simulation is a very important component of the final grade, accounting for 40% of the overall score of the participant. But there will be also an individual grade based on the performance of each of the participants in terms of individual participation and involvement in the course (including a peer review evaluation) and an intermediate Markstrat quiz The final component will be an individual essay to be submitted after finishing the course where every student would describe his/her learnings from the simulation, the strategies their team adopted, what went right and what went wrong in the eventual outcome.

criteria	percentage	Learning Objectives	Comments
Markstrat Quiz	10 %		
Individual Essay	25 %		
Team Performance in the Simulation	40 %		
Class Participation & Peer Review	25 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

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- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

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BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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MULTINATIONAL CORPORATIONS: CURRENT TRENDS, ECONOMIC DETERMINANTS & STRATEGIES

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 MCCT-NBA.1C.n.OPT.M.A

Area Economics

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **RODRIGO ALEGRIA HUERTA**

E-mail: ralegria@faculty.ie.edu

Rodrigo Alegría got his Bachelor in Economics from Universidad de Navarra (2001). At a postgraduate level, he got a Master in Economics and Finance from Universidad de Navarra (UN) and a Master in Regional Economics from London School of Economics (LSE). He also holds a title in Big Data (UN). He has worked mainly as a researcher in different research centers such as UN in Pamplona, Geography Department (LSE), Centre for Economic Performance (LSE) and European Institute (LSE) all of them in London. As a professor he has lectured in Spain and United Kingdom and has visited different countries such as Greece, Netherlands, United States or France for conferences and seminars. He is currently an adjunct professor at IE University and at other institutions lecturing quantitative courses such as maths, statistics, data analysis and econometrics. He is also the co-director of the EconData Lab at IE University. His interests focus on urban, regional and international economics with a special interest in the spatial econometrics analysis of MNEs´ location choices.

ralegria@faculty.ie.edu

PREREQUISITES

Basic microeconomics and macroeconomics.

SUBJECT DESCRIPTION

It is well acknowledged that multinational firms are currently key players in the world economy. Moreover, processes of market integration and globalisation have increased multinationals´ activities. As a consequence, the geographical pattern of capital formation, trade and technological spillovers is to an increasing extent determined by the different business strategies chosen by multinational firms (Why, When, Where and How to invest).

The emphasis of this course is to analyse the fundamentals of multinational corporations from an economic perspective and to understand their business strategies. The overall aim of the course is to provide students with a conceptual and theoretical knowledge and skill set that will allow them to successfully perform in international business environments.

The course first concentrates on defining and analysing the main concepts regarding multinational activity and its current facts and overall trends worldwide. Additionally, a comprehensive description and discussion of the international economic context is outlined focusing on globalisation, regionalism and the digital economy. After that, students will learn and understand a broad set of theories explaining the different forces, processes, methodologies and consequences in multinationals´ business strategies. Along the different lectures, relevant multinational firms' examples will be provided for a better understanding. Furthermore, the theoretical sessions are supported by real case studies and exercises about multinational corporations that will be carefully discussed in practical-discussion sessions.

LEARNING OBJECTIVES

The aim of the course is to provide students with a broad and up-to-date knowledge on a major dimension of international business: multinational corporations. This course equips students with a clear insight into current trends, economic determinants, strategies and economic effects of multinational firms.

Objectives to be attained along the course:

- Define the multinational firm and analyse its evolution, current trends and associate business decisions regarding why, when, how and where to invest.
- Address current globalisation, regionalism and digital economy to understand the challenges and opportunities that multinationals face in the current international context.
- Critically examine the economic determinants of multinationals activities.
- Provide a detailed understanding about FDI economic theories.
- Understand the various entry modes and organisational structures that multinationals may choose when entering in a foreign market.
- Analyse the potential economic impacts of multinational activity in host and home countries.
- Carefully discuss real world examples and relevant case studies about multinational firms.
- Prepare students for careers in the international business field.

Skills to be acquired during the course:

- Apply theories and concepts to analyse the multinational firm and to formulate and implement international business strategies.
- Address and debate controversial issues and case studies related with multinationals

strategies.
- Demostrate independence of thought during class discussions and coursework.
- Search, select, synthesise and analyse data in order to build arguments and present information effectively and logically.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	26.67 %	20.0 hours
Discussions	14.67 %	11.0 hours
Exercises in class, Asynchronous sessions, Field Work	14.67 %	11.0 hours
Group work	14.67 %	11.0 hours
Individual studying	29.33 %	22.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

The content of the course is structured into fifteen sessions, divided into four Units that are detailed below. Sessions are a combination of theoretical lectures with practical discussions/exercises and case studies. The course material (lecture slides and readings) will be available on Campus Online (see also the blibiography section).

UNIT 1: INTRODUCTION TO MNEs & INTERNATIONAL CONTEXT: sessions 1-4.
UNIT 2: ECONOMIC DETERMINANTS OF MNEs ACTIVITY: sessions: 5-8.
UNIT 3: SRATEGIC CONFIGURATIONS OF MNEs: sessions 9-10.
UNIT 4: MNEs EFFECTS ON HOME & HOST COUNTRIES: sessions 11-14.

Note that the last session is devoted to the final exam (session 15).

SESSION 1 (LIVE IN-PERSON)

Sustainability Topics:

- Economic Development

PRESENTATION AND INTRODUCTION TO MNEs

Lecture 1: Presentation of the course. What is a multinational firm? Main characteristics of MNEs and basic concepts regarding multinational activity.

SESSION 2 (LIVE IN-PERSON)

Sustainability Topics:

       - Economic Development

CURRENT FACTS AND TRENDS IN MULTINATIONAL ACTIVITY

Lecture 2: Summary and discussion about current stylised facts and overall trends in multinational activity worldwide using multinational activity data.

SESSION 3 (LIVE IN-PERSON)

Sustainability Topics:

       - Economic Development

INTERNATIONAL ECONOMIC CONTEXT

Lecture 3: What is globalisation? What is regionalism? Effects of globalisation and regionalism on multinational activity. What about the digital economy? The international business environment.

SESSION 4 (LIVE IN-PERSON)

Sustainability Topics:

       - Economic Development

MNES AND FDI STATISTICS: DATA ANALYSIS

Class 1: Working with multinational data and data sources. Data exercise.

SESSION 5 (LIVE IN-PERSON)

Sustainability Topics:

       - Economic Development

TRADITIONAL BUSINESS THEORIES (WHY? & WHEN?)

Lecture 4: Description and analysis of different business theories such as the OLI framework explaining the origin, evolution and types of multinational activity. Examination of business determinants affecting multinational activity.

SESSION 6 (LIVE IN-PERSON)

Sustainability Topics:

       - Economic Development

TRADITIONAL AND NEW TRADE THEORIES (WHY?)

Lecture 5: Description and analysis of different trade theories focusing on the distinction between horizontal and vertical FDI. Global decomposition of the value chain (fragmentation of production). New Economic Geography.

SESSION 7 (LIVE IN-PERSON)

Sustainability Topics:

       - Economic Development

ECONOMIC LOCATION DETERMINANTS (WHERE?)

Lecture 6: Examination of industry, firm and country determinants driving multinational activity. Other economic location determinants are also considered such as economic integration and agglomeration economies.

SESSION 8 (ASYNCHRONOUS)

Sustainability Topics:

- Economic Development

COUNTRY-LEVEL CASE STUDIES

Class 2: Analysis of one country-level case study about multinational activity: Ireland´s FDI Success. Asynchronous exercise.

SESSION 9 (LIVE IN-PERSON)

Sustainability Topics:

- Economic Development

MODE OF ENTRY AND MANAGERIAL COORDINATION (HOW?)

Lecture 7: Comprehensive analysis of MNEs´ entry modes in a foreign market such as indirect exporting, direct investment, joint ventures, licencing among others. Understanding the various strategies and organisational structures that can be used by MNEs when managing their overseas operations.

SESSION 10 (ASYNCHRONOUS)

Sustainability Topics:

- Economic Development

COMPANY-LEVEL CASE STUDIES

Class 3: Analysis of one company-level case study about multinational firms: Huawei´s Internationalization Success. Asynchronous exercise.

SESSION 11 (LIVE IN-PERSON)

Sustainability Topics:

- Economic Development

ECONOMIC EFFECTS OF MNES ON THE HOME COUNTRY

Lecture 8: Understanding the welfare impacts of multinational activity in home countries and outlying the various socio-political issues that may arise.

SESSION 12 (LIVE IN-PERSON)

Sustainability Topics:

- Economic Development

ECONOMIC EFFECTS OF MNES ON THE HOST COUNTRY

Lecture 9: Understanding the welfare impacts of multinational activity in host countries and outlying the various socio-political issues that may arise.

SESSION 13 (ASYNCHRONOUS)

Sustainability Topics:

- Economic Development

MULTINATIONAL FIRMS: HEROES OR VILLAINS OF THE GLOBAL ECONOMY

Class 4: Non-economic effects of multinational activity. Asynchronous exercise.

SESSION 14 (LIVE IN-PERSON)

Sustainability Topics:

- Economic Development

FINAL REVIEW

Lecture 10: Review of the course for the final exam. Case Study: Comparing Auto Sector in China and Mexico

SESSION 15 (LIVE IN-PERSON)

Sustainability Topics:

- Economic Development

FINAL EXAM

Exam: Exam about the material and content of the course.

EVALUATION CRITERIA

ORDINARY EVALUATION

Your final grade in the course will be based on a combination of different items that are described in the table at the end of this section and that are described in detail next.

A. CLASS PARTICIPATION (10%)

Two main criteria will be used in reaching judgment about your class participation:

Attendance: Attendance to class is compulsory. (1) Students must comply with the 70% attendance rule. (2) Punctuality will be taken into consideration when grading this assistance item and the teacher reserves the right to allow attendance to class to those students not being on time. Finally, (3) general attitude and behaviour in class will be also considered. Students affecting the class environment in a negative way will lose points in the assistance grade.

Active participation: participation in class will be evaluated positively if students: (1) attain a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. Additionally, (2) participation will be evaluated in quality terms. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

B. GROUP ACTIVITIES (40%)

Students are expected to complete exercises in the practical sessions. There will be some group assignments that the students will have to solve regarding those practical sessions. Groups must be of 3-4 students. More details about these assignments will be given in class.

C. FINAL EXAM (50%)

The final exam will take place at the end of the semester and will cover all the content of the course. The exam will be about the most relevant issues discussed during the course. More details about this exam will be provided in advance in class.

The passing grade of the course is 5 out of 10. You need to score at least 3.5 on the final exam to pass the overall course, even if you have already passed the course through the other course assessments.

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		Exam
Group Work	40 %		Exercises and Asynchronous Activities
Class Participation	10 %		Participation

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

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Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

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In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

 - UNCTAD. *UNCTAD. World Investment Report 2022.* ISBN 9789211129 (Digital)

 - Barba-Navaretti, G. and A. J. Venables. *Multinational Firms in the World Economy.* Princeton University Press. ISBN 9780691214276 (Digital)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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NEGOTIATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 NEG-NBA.1C.n.OPT.M.A

Area Negotiation

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **ENRIQUE PEÑA PEREZ**

E-mail: epena@faculty.ie.edu

ENRIQUE PEÑA PEREZ

Enrique Peña holds a masters degree in Civil Engineering and Infraestructure & Public Services Management by the Universidad Politécnica de Madrid and an MBA at the Wharton Business School of the University of Pennsylvania, awarded Joseph Wharton Award and Rafael del Pino Foundation Scholar.

Enrique has a broad professional experience of more than 20 years in business development and strategic management in organizations such as Shell, Boston Consulting Group, Orange and recently as a member of the Board of Directors of the spanish railways operator Renfe. Enrique is Associate Professor at IE Business / Law School where he teaches recognized Negotiations and Strategy courses in postgraduate, executive and in-company programs.

Education and Teaching/Research Experience

- Civil Engineering Masters Degree (Universidad Politécnica de Madrid).
- Masters in Infraestructures and Public Services Management (Universidad Politécnica de Madrid).
- Master in Business Administration. The Wharton Business School of the University of Pennsylvania (Rafael del Pino Scholar).
- Associate Professor of the Negotiation and Intermediation Centre of the IE Business School.
- Associate Professor of Strategy of the IE Business School.
      * Contact details: epena@faculty.ie.edu

      * Office hours: Flexible and avalaible as per request by email to epena@faculty.ie.edu

PREREQUISITES

There are no mandatory prerequisites for this course.

SUBJECT DESCRIPTION

This course is part of the BBA Elective group of courses. It mixes theory and practical cases to enhance participant´s negotiation skills.

Negotiation is in the air. We engage into negotiations with potential employers, classmate, spouses, roommates, landlords, parents, merchants, and many others. Determining what price we will pay, how much we want to be paid, who will cook dinner tonight.. all of these are negotiations. However, while we negotiate often, many of us know very little about the strategy and psychology of effective negotiations. Why do we sometimes get our way while other times we walk away feeling frustated with our ability to achieve the agreement we desire.

Negotiation is the art and science of securing agreements between two or more interdependent parties. This course has two purposes. First, we will discuss and apply theories developed as guides to improving negotiation (the science). Second, students will develop and enhance negotiation skill by negotiating with other students in realistic simulations (the art).

LEARNING OBJECTIVES

This course is designed to complement a foundamental skill in any business degree, and in general as an effective ability to use throughout professional careers and personal lives.

The purpose of this course is to understand the theory and processes of negotiation, and to develop expertise in managing negotiations in a very diverse array of situations.

This program is intended to improve participants' effectiveness in dealing with and resolving conflict and in negotiating by participating in relevant practical cases and by discussing these cases with the instructors. The program applies the negotiation methodology developed by the Negotiation and Mediation Center of the IE Business School.

At the end of the program, participants will understand what negotiation means, how to get ready for them, how to navigate though the negotiation process, how identify the relevant parties and the cultural and emotional context surrounding the negotiation.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	20.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	20.0 %	15.0 hours
Individual studying	20.0 %	15.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Course presentation, deliverables and evaluation criteria.

Understanding Negotiation

- Fields of knowledge around negotiation
- Addressing conflict: negotiation, mediation, arbitration, adjudication
- Understanding negotiation and its main elements
- Each negotiation is different: negotiation typologies.
- Negotiator dilemma game: cooperation vs. competition
- Facing a zero-sum negotiation

In class practice **zero-sum simulation** and debate

Practical Case: Sugar Bowl Distributive (Role of Seller) (DRRC) (to be delivered by professor)
Practical Case: Sugar Bowl Distributive (Role of a Buyer) (DRRC (to be delivered by professor)
Practical Case : The negotiator´s Dilemma in Successive Negotiations. Avant group. Management Commitee (NEG010038-U-ENG-WOD)
Practical Case : The negotiator´s Dilemma in Successive Negotiations. Avant group. Unions (NEG010039-U-ENG-WOD)
Please book 1 working room every 5 participants.

SESSIONS 3 - 4 (LIVE IN-PERSON)

Getting Ready to Negotiate

- Choosing our Goal
- Identifying our Interests
- Choosing our Strategy: the Five Conflict Handling Modes
- Exploring others´ Interests
- Building Options
- Valuating the different issues
- Generating other alternatives
- Preparing for difficult questions

- Facing a cooperative negotiation

In class practice **Interest Exploring Simulation** and debate

Practical Case: Kukui Nuts (2 ROLES) (DRRC) (to be delivered by professor)

SESSIONS 5 - 6 (LIVE IN-PERSON)

Walking through negotiations

- Stages of the negotiation process
- How to make concessions
- Moments of truth or critical moments: Commitments, Promises and Threads
- Positional vs. interest-based negotiations

Practical Case: College Town Apartments - 2 ROLES (DRRC) (to be delivered by professor)

SESSIONS 7 - 8 (LIVE IN-PERSON)

Influencing and Persuading during negotiations

- Initiating the Interaction: the Encounter
- Non-verbal communication
- Using persuasive arguments
- Displaying Tactics of Influence
- Using External Legitimacy Criterias
- Accepting or rejecting and Offer

Dealing with Emotions during Negotiations

- Emotional tone of a negotiation
- Deadlocks and conflict escalation

In class **influence and persuasion simulation** and debate

Walking through Negotiations (movies)

Practical Case: New Recruit - 2 ROLES (DRRC) (to be delivered by professor)

SESSIONS 9 - 10 (LIVE IN-PERSON)

Identifying parties in a negotiation

- Decision makers vs. influencers
- Power of the parties
- Designing Complex negotiations: coalitions
- Third-party interventions
- Negotiation Ethics

In class **identifying parties simulation** practice and debate

Practical Case: V-Cola: General Instructions (HBS 912043-PDF-ENG (to be delivered by professor))
Practical Case: V-Cola (6 roles) (HBS 912044-PDF-ENG to 912049-PDF-ENG) (to be delivered by professor)

SESSIONS 11 - 12 (LIVE IN-PERSON)

GO-OUT and Negotiate: **Real Persuasion Project**

SESSIONS 13 - 14 (LIVE IN-PERSON)

Negotiation Teams and Cultural Aspects

- Multicultural negotiations
- Negotiating in teams
- Closing a Negotiation
- Course Wrap-up

In class negotiating in **intercultural team's simulation** practice and debate

Practical Case: Alpha Beta (2 roles) (DRRC) (to be delivered by professor)

SESSION 15 (LIVE IN-PERSON)

Final Exam

EVALUATION CRITERIA

Your final grade in the course will be based on both individual and group work of different characteristics that will be weighted in the following way:

criteria	percentage	Learning Objectives	Comments
Final Exam	40 %		
Individual Work (Case Performance and Deliverables, including Persuasion Project)	40 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

Students are expected to participate in all class discussions and exercises. Missing an exercise costs you an opportunity to learn and disrupts the careful balance and pre-assignment of partners. Students are kindly requested to inform the professors in advance, if possible, in case they are unable to attend class.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Ø Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

Ø It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY
Recommended

- Fisher, Roger and Willian Ury. (1991). *Getting to Yes: Negotiation agreeement without giving in.* Penguin Books. ISBN 1844131467 (Printed)

- Fisher, Roger and Saphiro. (2006). *Beyond Reasons: Unsing Emotions as you Negotiate.* Penguin Books. ISBN 9780143037781 (Printed)

- William Ury. (2002). *Getting Past No: Negotiating with Difficult People.* Bantam Books. ISBN 9780553755589 (Printed)

- Horacio Falçao. *Value Negotiation.* Pearson. ISBN 9789810681 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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NEW TRENDS IN MKT MANAGEMENT

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 NTM-NBA.1C.n.OPT.M.A

Area Marketing and Communication

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **ROSA MARIA REIG RAMELLAT**

E-mail: rreig@faculty.ie.edu

Rosamaria Reig is a marketing professional with more than 18 years of experience in international companies, developing marketing, communication and digital strategies in diversified areas such as, consumer electronics, hospitality business and investment banking in Samsung, Hotusa and Banco Inversis, in UK and Spain. She holds an Executive MBA IE Business School (2010) and has a double degree in Journalism and Humanities. For the last 10 years, she has combined her career with teaching marketing subjects in different Universities and Business Schools, as well as tutoring final degree projects.

Online Office hours: Available after each class day in order to provide feedback and answer any doubts. (Bear in mind, that a previous e-mail is required to agree the time) Contact details: rreig@faculty.ie.edu

PREREQUISITES

Due to the specific features of this subject, it may be required for the students to have previous fundamental knowledge regarding basic marketing concepts acquired in the previous University years for the correct development of the learning process.

SUBJECT DESCRIPTION

In our fast changing world, understanding the trends that will shape our future is crutial if companies want to be successful. Offering to the consumer what they want (product or service) at the right time and place makes the difference. And being a succesful marketing profesional means to work and know about innovation, evolving your offering or creating new opportunities, requires not only to anticipate these trends but also to make them happen.

This course is designed with very inpiring material to stimulate students creativity, to improve their ability to innovate in marketing, and adapting the marketing strategies to this fast changing customers needs. The course is covering different market trends that are shaping the way brands communicate daily with consumers analising different sectors and companies strategies and creating new ways to stablish these relationships. These trends covers from the marketing evolution, digital marketing, relational marketing, sensorial marketing, emotional marketing to new economy models, technology suchs as Smart data, blockchain, Green marketing, Edutech, Fintech world and some new market demands.

LEARNING OBJECTIVES

Subject main objective is to analyze the different trends that are shaping our future and are affecting the companies' relations with the consumers. The focus during this course, by means of theoretical classes and practical business cases of the following trends defined below, will be:

To identify different commercial fields and to understand the differences between them in the marketing area.
To recognize the importance to adapt to each trend specific marketing strategies and policies in varied context.
To extend student capacity to implement to real context theoretical concepts learned in practical examples.
To develop efficient communication skills to present and explain ideas and strategies to the rest of the class.
To encourage students to search and analyze information to take strategic marketing decisions.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	40.0 %	30.0 hours
Individual studying	13.33 %	10.0 hours

TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (ASYNCHRONOUS)

Defining Marketing and the Marketing Process; Digital Marketing, Social Media and Mobile Marketing.

Technical note & tutorials: Positioning and Marketing Planning Process (MKS020164-U-ENG-VID)

Technical note & tutorials: Business Goals for Digital Marketing (MKS020203-U-ENG-VID)

SESSION 2 (LIVE IN-PERSON)

Defining Marketing and the Marketing Process. Distribution channel marketing, e-commerce, consumer-to-consumer, mobile apps,

omnichannel strategies

Technical note & tutorials: Digital Marketing: Social Media and Mobile Marketing (MKS020091-U-ENG-HTM)

SESSION 3 (LIVE IN-PERSON)

From Marketing 1.0 to 4.0. What is the rol of emotions with the relationship with consumers?

Technical note & tutorials: Consumer Behavior: Motivation (MKS020138-U-ENG-VID)
Technical note & tutorials: Consumer Behaviors and Drivers (MKS020136-U-ENG-VID)
Technical note & tutorials: Consumer Behavior: Perception and Memory (MKS020142-U-ENG-VID)

SESSION 4 (LIVE IN-PERSON)

Collaborative Consumption "I don't need a drill, I need a hole"

Practical Case : Airbnb: Disrupting the hotel industry? (STR010099-U-ENG-WOD)

SESSION 5 (LIVE IN-PERSON)

From BIG DATA to SMART DATA

Technical note & tutorials: Processing Big Data: Netflix Case Study (ENT020211-U-ENG-VID)
Technical note & tutorials: Big Data (IST020065-U-SPA-HTM)

SESSION 6 (LIVE IN-PERSON)

Immersive Technologies from AV-AR to the Metaverse

Technical note & tutorials: Virtual Reality vs. Augmented Reality (ENT020199-U-ENG-VID)
Technical note & tutorials: Using the metaverse in business (IST020362-U-ENG-VID)

SESSION 7 (ASYNCHRONOUS)

Innovation Business Models (WORKING BACKWARDS AND LEGO SERIUOS PLAY)

Technical note & tutorials: Disruptive Innovation (IST020197-U-ENG-VID)

Practical Case : Innovation Island (STR010110-U-ENG-HTM)

SESSION 8 (LIVE IN-PERSON)

New demads, amplifying the target markets to reach a global consumers.

Technical note & tutorials: The Costumer Journey: The six steps to an omnichannel company (MKS020087-U-ENG-HTM)

SESSION 9 (LIVE IN-PERSON)

Go green: Circular economy

Practical Case : Go Green (LAW010345-U-ENG-WOD)
Technical note & tutorials: CSR and Greenwashing (ENT020231-U-ENG-VID)

SESSION 10 (ASYNCHRONOUS)

ESG

Technical note & tutorials: Foundations of Sustainability (CSR020013-U-ENG-HTM)
Practical Case : Loewe case study: Sustainability and Durable Luxury (STR010093-U-SPA-WOD)
Technical note & tutorials: Corporate social responsibility and sustainability (FIN020293-U-ENG-VID)

SESSION 11 (LIVE IN-PERSON)

AI: THE DARK SIDE OF DIGITALIZATION

Technical note & tutorials: Introduction to Artificial Intelligence (IST020277-U-ENG-VID)
Technical note & tutorials: Main Areas of Artificial Intelligence (IST020262-U-ENG-VID)
Technical note & tutorials: Artificial Intelligence and the Future of Work (IST020167-U-ENG-VID)

SESSIONS 12 - 13 (LIVE IN-PERSON)

FINAL GROUP PRESENTATION

SESSION 14 (LIVE IN-PERSON)

Q&A SESSION SUBJECT RECAP

SESSION 15 (LIVE IN-PERSON)

FINAL EXAM

EVALUATION CRITERIA

A. CLASS PARTICIPATION

 A Three main criteria will be used in reaching judgment about your class participation:

Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

B.   ONLINE FORUM PARTICIPATION/ INDIVIDUAL WORK

Open debates will be open in the virtual campus where participation is a part of this subject, contributing with examples and ideas.

The aim of this forum is to improve your knowledge in marketing-related last-minute news, where you will have to be up to date with what are the latest news in this field and discuss with your classmates about different marketing trends.

D.   FINAL GROUP PRESENTATION AND REPORT

You are also expected to complete a final project with your group and present it in written form to the teacher, as well as conducting a 10-minute power point online presentation to your classmates. The project will give you the opportunity to reflect on what you have learnt in class and apply it to some practical problems. More details of the project will be provided by the start of the course.

E.   FINAL EXAM

The final exam will check your understanding of marketing and will focus more on the application of marketing concepts in the different trends. Hence, it might involve the analysis of a "mini" case study or to work on some short marketing exercises. It might also include some multiple-choice questions where more than one can be correct and the wrong answers might subtract points.

*Bear in mind that due to some speakers' agenda, some of the planning mentioned above might change. However you will be informed at least with one week in advance through your virtual campus. This might affect also to the presentations day or exam day.

IMPORTANT: during this subject the professor will use a power point presentation that will be uploaded to the virtual campus one week after each session.

criteria	percentage	Learning Objectives	Comments
Final Exam	40 %		
Intermediate tests	0 %		
Individual work	10 %		
Individual presentation	0 %		
Group Work	40 %		
Other	0 %		
Group Presentation	0 %		
Class Participation	10 %		

RE-SIT / RE-TAKE POLICY
Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Ø Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

Ø It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

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Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

 - Philip Kotler. (2019). *Marketing Management.* PEARSON. ISBN 9781292248448 (Printed)

 - KOTLER. (2023). *Principles of Marketing.* 19th edition. PEARSON. ISBN 9781292449364 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

Please, check the University's Ethics Code [here](). The Program Director may provide further indications.

PRICING FOR VALUE AND PROFITABILITY

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 PVP-NBA.1C.n.OPT.M.A

Area Marketing and Communication

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **CESAR MORENO PASCUAL**

E-mail: cmorenop@faculty.ie.edu

CESAR MORENO PASCUAL

ACADEMIC BACKGROUND

- PhD in Business and Economics
- M.B.A at IESE Business School
- Bachelor of Law (UNED)
- Civil Engineer (Universidad Politécnica de Madrid)

CORPORATE EXPERIENCE

He has more than 25 years of business experience running his own Legal advice by telephone and Internet Company for 8 years, managing areas and being on the steering committee of several companies in the Financial and Insurance sector and Entertainment. He also developed industrial and consulting projects in several countries such as Egypt and Portugal. Currently, he teaches at IE University and other Universities and is a business consultant, having participated in the development of many technological products. Some of them are related to industrial R&D companies, having achieved the best recognition in EU H2020 programs. He is a shareholder of some of the spin-off companies of those R&D projects, participating in their steering committees.

cmorenop@faculty.ie.edu

PREREQUISITES

no prerequites

SUBJECT DESCRIPTION

Pricing is one of the most important marketing decisions, but less understood. Learn and practice concepts and techniques and get the latest insights on evaluation and formulation of pricing strategies. Analyse the way companies try to capture value, in addition to profits, in the income they get.

After this course, you can actively participate in the process of formulating pricing strategies for your own products and services, or those of your company. This course also focuses on the dynamics of pricing and the reaction of competitors. As such, a very pragmatic approach is used and directly applicable to the day-to-day professional life.

The objective of this course is to introduce you to the concepts, analyses, and activities that comprise marketing management and to provide practice in assessing and solving marketing problems.

The course is designed to further develop your critical thinking skills. Ultimately, you should develop decision-making skills, including the ability to analyse problems, evaluate alternatives, and make better marketing decisions. If this course is successful, you will feel more prepared to approach new situations, make decisions and develop strategies based on careful pricing analysis

LEARNING OBJECTIVES

This course is designed to:

- Learn and understand various concepts, accumulated learnings, and some technical skill sets needed to develop effective pricing of all kinds.
- Enhance your problem-solving abilities in pricing by providing you with a set of analytical tools – frameworks, concepts, models and techniques.
- Practice generating ideas and getting them across to others in an effective manner, both in writing and in a face-to-face situation.

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	24.0 %	18.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	16.0 %	12.0 hours
Group work	20.0 %	15.0 hours
Individual studying	26.67 %	20.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

The pricing process and overview of techniques_ cost based_value based_competition

An overview of the pricing techniques, common misunderstandings and process

Book Chapters: The Strategy and Tactics of Pricing; Read Chapter 1 pg. (1-12) (IE Library)(Optional)

Book Chapters: Pricing and revenue optimization; Read Chapter 2 (IE Library)(Optional)

COMPULSORY

1.-Technical note 1: Beyond the 3 Cs

NON COMPULSORY

Read Chapter 1 pg. (1-12)(T.T. Nagle, J.E. Hogan)

Read Chapter 2 (Robert L. Phillips)

SESSION 2 (LIVE IN-PERSON)

Value based model :

1.- Exchange value model; setting the boundaries

Book Chapters: The strategy and tactics of pricing : a guide to profitable decision making; Read Chapter 3 (pg.27-45) Value creation: exchange value model(Optional)

Book Chapters: Pricing and Revenue optimization (Book)

Book Chapters: Pricing strategy setting price levels, managing price dsicounts and establishing price structures; Read Chapter 1 (pg 8-17) Exchange value models(Optional)

COMPULSORY

   1.- Technical note 5: exchange value

   2.- Exercises/short cases/quizzes

NON-COMPULSORY

   1. Read Chapter 1 (pg 8-17) Exchange value models (Tim J. Smith)

   2. Read Chapter 3 (pg.27-45) Value creation: exchange value model (T.T. Nagle, J.E. Hogan)

SESSION 3 (LIVE IN-PERSON)

1.-Price structure; costs, price metrics, price discrimination

2.-Value measurement: sources of data

Book Chapters: The Strategy and Tactics of Pricing; Read Pg. 149-171 & 54-79(Optional)

Book Chapters: Pricing Strategy setting price levels, managing price discounts. establishing price structures; Read Chapter 6 Price segmentation (Pg. 102-120)(Optional)

Book Chapters: Pricing and revenue optimization; Read Chapter 4 Price differentiation (pg 74-96)(Optional)

COMPULSORY

   1. Technical Notes: (costs), and (metrics and price discrimination)

   2. Exercises/short case and quizzes

NON COMPULSORY

   1. Read Chapter 8 costs (Pg. 149-171) (T.T. Nagle, J.E. Hogan)

   2. Read Chapter 13 Price and value measurement (Pg. 54-79) (T.T. Nagle, J.E. Hogan)

   3. Read Chapter 6 Price segmentation (Pg. 102-120) (Tim J. Smith)

   4. Read Chapter 4 Price differentiation (pg 74-96) (Robert L. Phillips)

   5. Read Chapter 4 Price Structure (Pg. 54-79) (T.T. Nagle, J.E. Hogan)

SESSION 4 (LIVE IN-PERSON)

Value-based II: demand-based models

1.- Willingness to pay and price optimization; Understanding and researching the price response curve

2.-Theoretical models: linear, logit, constant elasticity.

3.- Elasticity in practice: Test A/B for elasticity assessment and price optimization

All the theoretical models their relationship with w.t.p. Particular review of price optimization considering constant elasticity. Tests A/B for elasticity assessment and price optimization

Book Chapters: The Strategy and Tactics of Pricing (Book)

Book Chapters: Pricing Strategy setting price levels, managing price discounts. establishing price structures; Read Chapter 2 pg 34-38(Optional)

Book Chapters: Pricing and revenue optimization; Read Chapter 3.1,3(Optional)

COMPULSORY

1. Technical note: willingness to pay a practical application
2. Technical note: theoretical models and Test A/B
3. Exercises/short case/quizzes

NON COMPULSORY

1. Read Chapter 3.1,3 (Robert L. Phillips)
2. Read Chapter 2 pg 34-38 (Tim J. Smith)

SESSION 5 (LIVE IN-PERSON)

Value-based II: demand-based models

1.- Willingness to pay and price optimization; Understanding and researching the price response curve

2.-Theoretical models: linear, logit, constant elasticity.

3.- Elasticity in practice: Test A/B for elasticity assessment and price optimization

All the theoretical models their relationship with w.t.p. Particular review of price optimization considering constant elasticity. Tests A/B for elasticity assessment and price optimization

COMPULSORY

1. Technical note: willingness to pay a practical application
2. Technical note: theoretical models and Test A/B
3. Exercises/short case/quizzes

NON COMPULSORY

1. Read Chapter 3.1,3 (Robert L. Phillips)
2. Read Chapter 2 pg 34-38 (Tim J. Smith)

SESSION 6 (LIVE IN-PERSON)

Value-based II: demand-based models

1.- Willingness to pay and price optimization; Understanding and researching the price response curve

2.-Theoretical models: linear, logit, constant elasticity.

3.- Elasticity in practice: Test A/B for elasticity assessment and price optimization

All the theoretical models their relationship with w.t.p. Particular review of price optimization considering constant elasticity. Tests A/B for elasticity assessment and price optimization

COMPULSORY

1. Technical note: willingness to pay a practical application
2. Technical note: theoretical models and Test A/B
3. Exercises/short case/quizzes

NON COMPULSORY

1. Read Chapter 3.1,3 (Robert L. Phillips)
2. Read Chapter 2 pg 34-38 (Tim J. Smith)

SESSION 7 (LIVE IN-PERSON)

INDIVIDUAL ACTIVITY: A case study

Putting together some techniques and reasonings

COMPULSORY

1. Read the case (will be uploaded on campus)
2. Solve the group questions (ONLINE)Answer individual quiz (ONLINE)

SESSION 8 (LIVE IN-PERSON)

Pricing in constrained markets

Book Chapters: The Strategy and Tactics of Pricing (Book)

Book Chapters: Pricing and revenue optimization; Read Chapter 5 Pricing with constrained supply(Optional)

Book Chapters: Pricing Strategy setting price levels, managing price discounts. establishing price structures (Book)

COMPULSORY

Technical note: constrained markets
Exercises/ short case/quizzes

NON COMPULSORY

Read Chapter 5 Pricing with constrained supply (Robert L. Phillips)

SESSION 9 (LIVE IN-PERSON)

Midterm

Online exam

Book Chapters: Pricing Strategy. Setting Price Levels, Managing Price Discounts & Establishing Price Structures (Book)

Technical note: Pricing and Revenue optimization (Book)

SESSION 10 (LIVE IN-PERSON)

Competition

The role of competition in the pricing process

Book Chapters: The Strategy and Tactics of Pricing; Read Chapter 10 Managing conflict thoughfully; Read Chapter 10 Managing conflict thoughfully

Book Chapters: Pricing Strategy setting price levels, managing price discounts. establishing price structures; Read chapter 15 Competion and pricing(Optional)

COMPULSORY

1. Technical note 8
2. Read Chapter 10 Managing conflict thoughfully (T.T. Nagle, J.E. Hogan)
3. Exercises/short case/quizzes

NON COMPULSORY

1. Read chapter 15 Competion and pricing (Tim J. Smith)

SESSION 11 (LIVE IN-PERSON)

Pricing specific cases

1. subscriptions, versions (conjoint analysis) and add-ons, distribution channels

Book Chapters: The Strategy and Tactics of Pricing; Read Chapter 11 Pricing in channels of distribution(Optional)

Book Chapters: Pricing Strategy setting price levels, managing price discounts. establishing price structures; Read Chapter 10,11,12 and 13 (no appendixes)(Optional)

COMPULSORY

1. Technical notes
2. short videis
3. Exercises/Short cases/quizzes

NON COMPULSORY

1. Read Chapter 10,11,12 and 13 (no appendixes) (Tim J. Smith)
2. Read Chapter 11 Pricing in channels of distribution (T.T. Nagle, J.E. Hogan)

SESSION 12 (LIVE IN-PERSON)

Price and value communication. Psycological factors

How to modify the willingness to pay

Book Chapters: The Strategy and Tactics of Pricing; Chapter 5 (pg. 95-101)(Optional)

Book Chapters: Pricing Strategy setting price levels, managing price discounts. establishing price structures; Read Chapter 5 Psycological influences on price sensitivity(Optional)

Book Chapters: Pricing and revenue optimization; Read chapter 12(Optional)

COMPULSORY

1. Technical note
2. Exercises/short case/quizzes

NON COMPULSORY

1. Read Chapter 5 Psycological influences on price sensitivity (Tim J. Smith)
2. Read chapter 12 Pricing and revenue optimization and customer acceptance
3. Chapter 5 (pg. 95-101) (T.T. Nagle, J.E. Hogan)

SESSION 13 (LIVE IN-PERSON)

Revenue management and dynamic pricing

An introduction to some advanced techniques

Customized pricing

Request for proposals (RFP) scenarios

Book Chapters: The Strategy and Tactics of Pricing (Book)

Book Chapters: Pricing Strategy setting price levels, managing price discounts. establishing price structures; Read Chapter 14 Yield management(Optional)
Book Chapters: Pricing and revenue optimization; Read Chapter 11 Customized pricing(Optional)

COMPULSORY

1. Technical notes
2. Short video class
3. Exercises/short cases/ quizzes

NON COMPULSORY

1. Read Chapter 11 Customized pricing (Robert L. Phillips)
2. Read Chapter 14 Yield management (Tim J. Smith)

SESSION 14 (LIVE IN-PERSON)

Group activity presentations

SESSION 15 (LIVE IN-PERSON)

Final Exam

EVALUATION CRITERIA

Your final grade in the course will be based on both individual and group work. The evaluation is based on:

criteria	percentage	Learning Objectives	Comments
Final Exam	40 %		
Intermediate Tests	15 %		
Individual Work_quizzes	20 %		compulsory quizzes
Group Presentation	20 %		final project
Class Participation	5 %		

RE-SIT / RE-TAKE POLICY
A. CLASS PREPARATION AND PARTICIPATION

Class participation is evaluated in FOUR ways. Students are encouraged to answer the instructor's questions or to offer their opinion. This is especially relevant for practice discussions. Main criteria for judgment are as follows:

1. Depth and Quality of Contribution: The quality of your comment in terms of depth of insight, rigorous use of case evidence, consistency of argument, and realism will be highly appreciated.

2. Moving Your Peers' Understanding Forward: Along with the content, the way of conveying your ideas will also be considered. Your way of presentation should be concise and clear, accompanied by a spirit of involvement in the discussion at hand. You will have multiple chances to present, therefore your improvement along the way will be noted.

3. Frequency: It is encouraged that you participate as much as you can, but this does not mean you should speak for the sake of reaching some critical number. Beyond certain threshold, the

quality of your comment is more important.

4. <u>Class preparation:</u> showing that the student has read the content and/or slides given participating with knowledge based questions or comments

Note that if you miss the class, regardless of the cause for the absence, you will automatically be forfeited the opportunity to earn participation credit allocated for that session.

Participation is also attendance and punctuality. Being present at the classroom is absolutely necessary. The attendance will be checked by you signing the sign-in sheet every single session or joining online session, that is, twice if there is a double session. It is extremely important not to forget this, because your attendance record will depend on it. Also, tardiness will affect your grades.

B. CAPSTONE/GROUP ACTIVITY

Each Group should present an analysis of an original case or pricing situation and propose solutions using the frameworks and expertise gather during the course and presenting it in the sessions planned in the Syllabus.

At the beginning of the Course, we will discuss further the allowed ideas.

It is particularly valuable how innovative is the situation/ business case and the solutions proposed. The grading can include some part of peer assessment if the is some reason to think about a possible unfar workload.

The group activity could include some peer assessment.

C. INDIVIDUAL ACTIVITY: COMPULSORY QUIZZES

There will be some quizzes during the course:

- COMPULSORY: related to the compulsory content, usually online quizzes

D. INTERMEDIATE EXAM/FINAL EXAM

The intermediate and final exam will focus more on the application of pricing concepts. Hence, it might involve the analysis of several mini cases, a test and some short exercises. There will be only about the COMPULSORY CONTENT

RETAKE/ RE-SIT POLICE

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be

capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.
- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- T.T. Nagle, J.E. Hogan. (2017). *The Strategy and Tactics of Pricing.* 6th edition. Routledge. ISBN 9781138737518 (Printed)

Recommended

- Tim J. Smith. *Pricing Strategy setting price levels, managing price discounts. establishing price structures.* Ohio : South-Western ; Andover : Cengage Learning. ISBN 9781111571290 (Digital)
- Robert L. Phillips. *Pricing and revenue optimization.* Palo Alto : Stanford University Press, 2006.. ISBN 9780804781640 (Digital)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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PRIVATE EQUITY

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 PEQ-NBA.1C.f.OPT.M.A

Area Finance

Number of sessions: 25

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 5.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JULIO JIMÉNEZ-BLANCO MESONERO-ROMANOS**

E-mail: jjimenezblanco@faculty.ie.edu

PROFESSOR BIO

Julio Jiménez-Blanco has 10 years of experience in investment banking, mostly focused in mergers & acquisitions. He currently works as a Principal at Greenhill, a leading independent investment bank focused on providing financial advice globally on significant mergers, acquisitions, restructurings, financings and capital advisory to corporations, partnerships, institutions and governments. He is part of the of the founding team of the first Greenhill office in Spain and has led the execution of several corporate transactions across different sectors in Spain and globally advising Private Equities and Board of Directors of diverse companies. Before Greenhill, Julio worked for one of the leading activist funds in Europe (Alantra QMC) and at the M&A division of BBVA, one of the largest financial groups globally.

Julio holds a BSc in Business Administration & Finance from CUNEF.

jjimenezblanco@faculty.ie.edu

PREREQUISITES

In order to get the most out of this course students must have knowledge in corporate finance and in the different valuation methodologies

SUBJECT DESCRIPTION

Edited by Documentation
19th July 2023

With a record level of assets under management, Private Equity ("PE") has become a key asset class worldwide, attracting the interest from many. From regulators and pension funds to companies seeking to raise money to grow or being disposed, investment banks and various professionals seeking a position in the industry.

After posting a record-breaking performance in 2021 and 2022, private equities now face a tough outlook. Spiking interest rates have caused a sharp decline in deals, exits, and fund-raising during, almost certainly signaling a turn in the cycle. While this environment will challenge PE to find new ways to create value and underwrite risk, the long-term outlook for PE remains fundamentally sound.

In this course, you will lever on the experience you have gained in other courses, such as corporate finance, to understand the PE industry, its attractiveness, and its contribution not only to investors but also to the overall society.

LEARNING OBJECTIVES

This course will provide an overview of the type of work performed by a PE fund and a global perspective of the value creation process in and after the acquisition of a business, which is something useful for any role in a company. This knowledge could be used not only when working for a PE, but also for investment banks, consulting firms, for the M&A department of many companies, for a family business or even by current / future entrepreneurs seeking to raise capital or dispose their companies.

Among many others, in this course you will:

- Learn the various stages of a PE investment, from deal origination through harvesting returns
- Understand the PE valuation frameworks
- Study tools that PE firms use to structure and finance a deal, create value, and determine exit timing
- Understand the key drivers in the PE market and key differences between funds' strategies
- Analyze a deal from the different points of view of a PE firm
- Work in teams to create a paper very similar to what PE present to their investment committees to approve a deal
- Be exposed to different people that form the Spanish PE network

TEACHING METHODOLOGY

In the first part, the course will set up the foundations and key fundamentals of the PE industry. In the second part, we will put these into practice by combining real life case method analysis with suggested readings and guests (mostly leading industry executives).

The course is designed to be highly interactive, and students will learn from discussion in class. In that sense, while the course is designed to provide students with interesting materials and facilitated discussion, much of their learning will depend on their engagement, preparation, and active participation.

In sessions 23 and 24, students will be asked to present an investment opportunity to the rest of class as if they were the investment committee of a PE. Further instructions (including team formation and time limitations) will be confirmed after session 1.

Final session (25) will comprise an exam that will test the overall understanding of all the previous sessions.

Students are encouraged to bring their personal computers to class.

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	10.0 %	12.5 hours
Discussions	10.0 %	12.5 hours
Exercises in class, Asynchronous sessions, Field Work	10.0 %	12.5 hours
Group work	50.0 %	62.5 hours
Individual studying	20.0 %	25.0 hours
TOTAL	100.0 %	125.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

The Private Equity fundamentals

Introduction to the course and the concept of Private Equity. Overview of the several types of funds that are active in the market and their stakeholders

SESSION 2 (LIVE IN-PERSON)

Key elements of the investment analysis performed by PE

SESSION 3 (LIVE IN-PERSON)

Value creation; Elements and measures of PE returns

SESSION 4 (LIVE IN-PERSON)

LBO walkthrough (1/2)

How to make an LBO model: Key drivers, how to make the projections, financing, sources and uses, etc.

SESSION 5 (LIVE IN-PERSON)

LBO walkthrough (2/2)

Continuation of SESSION 4

SESSION 6 (LIVE IN-PERSON)

Other valuation methodologies used by PE

Overview of other key valuation methodologies used by PE to assess the value of a business: DCF, trading comparables and precedent transactions

SESSION 7 (LIVE IN-PERSON)

Exit

How to plan and execute divestments

SESSION 8 (LIVE IN-PERSON)

Fundraising and fund structuring process

Overview of how the fundraising and fund structuring process of a PE works. Includes case study/ies

Session with industry professional

SESSION 9 (LIVE IN-PERSON)

Stages of the PE investment process

Description of the different stages in the investment process (sourcing, investment analysis, holding period and exit). Includes case study/ies

Session with industry professional

SESSION 10 (LIVE IN-PERSON)

How PE help companies

Overview of how PE create value/returns not only for their investors, but also to the companies they invest in and, as such, to the overall society

Session with industry professional

SESSION 11 (LIVE IN-PERSON)

Due diligence (1/2)

Introduction to the concept of due diligence and focus on commercial due diligence. Includes case study/ies

Session with industry professional

SESSION 12 (LIVE IN-PERSON)

Due diligence (2/2)

Focus on financial, tax, legal and labour due diligence. Includes case study/ies

Session with industry professional

SESSION 13 (LIVE IN-PERSON)

Financing

Overview of the different debt financing instruments used by PE to finance the investments and how those create value for PE, how the process of raising debt financing works and implications of raising debt (financing conditions, covenants, etc.). Includes case study/ies

Session with industry professional

SESSION 14 (LIVE IN-PERSON)

Legal documents

Overview of the main legal contracts involved in a deal. Includes case study/ies

Session with industry professional

SESSION 15 (LIVE IN-PERSON)

Local PE
How local PE work, differentiate from other type of PE and case study
Session with industry professional

SESSION 16 (LIVE IN-PERSON)

International PE
How international PE work, differentiate from other type of PE and case study
Session with industry professional

SESSION 17 (LIVE IN-PERSON)

Special situations
How special situations PE work, differentiate from other type of PE and case study
Session with industry professional

SESSION 18 (LIVE IN-PERSON)

Growth equity
How growth PE work, differentiate from other type of PE and case study
Session with industry professional

SESSION 19 (LIVE IN-PERSON)

Infrastructure funds
How infrastructure funds work, differentiate from other type of PE and case study
Session with industry professional

SESSION 20 (LIVE IN-PERSON)

Real estate PE
How real estate PE work, differentiate from other type of PE and case study
Session with industry professional

SESSION 21 (LIVE IN-PERSON)

Private credit funds
How private credit funds work, differentiate from other type of PE and case study
Session with industry professional

SESSION 22 (LIVE IN-PERSON)

Venture capital funds
How venture capital funds work, differentiate from other type of PE and case study

Session with industry professional

SESSION 23 (LIVE IN-PERSON)

Final group project presentation

Based on the learnings from the course, you are asked to present an investment opportunity to the rest of the class as if they were the Investment Committee of a PE Fund. Please choose a company and prepare a presentation including the following table of contents: (power point slides + live presentation

- Business overview
- Why would you invest in this company?
- Key risks and mitigants
- Strategy going forward: Strategy to add value and execution plan for that strategy
- Valuation and expected return
- Potential competitors in acquiring the company
- Exit strategy

Presenting students will be graded based on the presentation (power point slides + live presentation + answers to the questions posed by other students). Non-presenting students will also be evaluated based on their participation on the Q&A.

Further instructions (including team formation and time limitations) to be confirmed after session 1.

SESSION 24 (LIVE IN-PERSON)

Final group project presentation

Continuation of SESSION 23.

SESSION 25 (LIVE IN-PERSON)

Final exam

Exam to test the overall understanding of all the previous sessions.

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	30 %		Exam to be carried out in session 25
Group Work	45 %		Final group project presented to the class (including answers to the questions posted)
Class Participation	25 %		Active participation in class

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.).

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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PROFESSIONAL ETHICS AND CORPORATE RESPONSABILITY

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 PECR-NBA.1C.n.OPT.M.A

Area Accounting and Management Control

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **ALBERTO MORENO DE TEJADA CLEMENTE DE DIEGO**

E-mail: amoc@faculty.ie.edu

Alberto Moreno de Tejada has a PhD in Political Science from the Universidad Complutense de Madrid and Instituto de Investigación Ortega y Gasset. His doctoral thesis was a study on ethical leadership in public administration applying the case study´s methodology. His prime research interest is on ethics, leadership and governance in organizations. He has published articles in different newspapers and journals. He is the author of several case studies of ethics in organizations and of the book: "Funcionarios Ejemplares. Carácter y liderazgo en la Administración Española", INAP, 2013.He also holds a MBA and a B.Sc. in Business Administration as well as LL.B and a Diploma in Religious Science and in International Finance.

He started his professional career as an investment banker. He is currently a professional ethics lawyer at Madrid´s Bar. He teaches ethics in finance in several programmes at the IEB. He was Associate Director of the Executive Master in Responsible Banking at IEB. He was also a consultant for the OECD on Ethics Training Programmes for public officials and director and secretary of the board of a multinational public company.

amoc@faculty.ie.edu

PREREQUISITES

None

SUBJECT DESCRIPTION

Professional Ethics is the part of ethics which applies to the practice of a profession. For this course, the business ethics concept will be identified to best practices in business meaning doing the right thing from a holistic approach to ethics and corporate social responsibility. As students have already completed an introductory ethics course, they are now familiar with moral dilemmas, tools and practical knowledge to be applied in everyday life problems. With this new course we want to go a step further. Students are required to accomplish in depth knowledge of business ethics that enable them to acquire the necessary skills to solve ethics conflicts and moral dilemmas that will appear in their future business careers as a managers or entrepreneurs and to manage the corporate responsibility inside their business.

Therefore, we develop a theoretical framework to professional ethics and corporate responsibility focusing on practical tools to understand and apply business ethics issues. Our approach is person-centred as we believe that people are the ultimate responsible for the development of ethical cultures in business organizations. Students will be expected to understand the current topics, ethical issues and dilemmas generally discussed in the business ethics field. Moreover, they should become familiar with the tools used in business organizations to reduce ethics and reputational risks. We will provide numerous cases to be discussed, along with illustrative examples in order for students to get a practical knowledge that they could apply in their future business careers. But above all, they should understand that ethics is a foundation of human excellence, and deontology an indispensable pillar in entrepreneurship or business excellence to become better companies to work, to invest or to buy.

LEARNING OBJECTIVES

The main objective of this course is to grow in personal commitment to building organizational cultures that promote and reinforce ethical conduct and corporate responsibility.

The course is designed:

- To understand the role of ethics in business
- To gain an understanding of the individual responsibility within the Organization
- To acquire an idea of the mainstream theories and approaches used in business ethics
- To identify the risks to misconducts, malpractice and other unethical actions in business
- To awake a conciseness for the value and necessity of ethics in business
- To develop a compromise with deontology practice as an indispensable pillar towards achieving business excellent
- To understand the fundamental tools used in corporations to develop ethical cultures
- To appropriate a desire to help oneself and others act ethically at work and in life in general
- To manage the main tools of CSR management: strategy, materiality, reporting, accountability and measuring
- To understand the value generated by the CSR implementing inside and outside the Company

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	13.33 %	10.0 hours
Group work	26.67 %	20.0 hours
Individual studying	26.67 %	20.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Topic: The Role of Ethics in Business

Book Chapters: Business Ethics in Action (Chapter 1) (See Bibliography)

SESSION 2 (LIVE IN-PERSON)

Topic: Markets and Culture

Book Chapters: Business Ethics in Action (Chapters 2 & 3) (See Bibliography)

SESSION 3 (ASYNCHRONOUS)

Student presentations and discussions

Practical Case: Audi A8 - The world's first level-3 autonomous vehicle (HBS W20134-PDF-ENG)
Multimedia Material: The Inventor (Prime Video)

SESSION 4 (LIVE IN-PERSON)

Topic: Ethics & responsibility

Book Chapters: Business Ethics in Action (Chapters 4 & 3) (See Bibliography)

SESSION 5 (LIVE IN-PERSON)

Student presentations and discussions

Article: Why I am leaving Goldman Sachs (The New York Times, MARCH 14, 2012) (CED)
Multimedia Material: Video: Before the Flood (IE Library)

SESSION 6 (LIVE IN-PERSON)

Topic: Firms and their purposes

Book Chapters: Business Ethics in Action (Chapters 6 & 7) (See Bibliography)

SESSION 7 (ASYNCHRONOUS)

Student presentations and discussions

Article: The Social Responsibility of Business is to Increase its Pro?ts (The New York Times, September 13, 1970) (CED)
Book Chapters: Doughnut economics (ced)
Multimedia Material: Why it's time for 'Doughnut Economics' (TEDx event) (Youtube)

SESSION 8 (LIVE IN-PERSON)

Topic: Power, virtues and ethical leadership

Book Chapters: Business Ethics in Action (Chapters 8 & 9) (See Bibliography)

SESSION 9 (LIVE IN-PERSON)

Student presentations and discussions

Multimedia Material: Surveillance Capitalism (Documental VPRO) (Youtube)
Book Chapters: The man who didn't ask questions, chapter 35 (ced)

SESSION 10 (LIVE IN-PERSON)

Topic: Codes and Organizational culture. Understanding conduct risk

Book Chapters: Business Ethics in Action (Chapters 10 & 11) (See Bibliography)

SESSION 11 (ASYNCHRONOUS)

Student presentations and discussions

Technical note: Captured by Cotton (May 2011) (SOMO and ICN)
Technical note: Global Code of Conduct (Pepsico)

SESSION 12 (LIVE IN-PERSON)

Topic: CSR reports and accountability

Book Chapters: Business Ethics in Action (Chapter 13) (See Bibliography)

SESSION 13 (LIVE IN-PERSON)

Discussion Forum: Impact Investments

SESSION 14 (LIVE IN-PERSON)

Group presentations assignment II.

SESSION 15 (LIVE IN-PERSON)

Individual essay

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Class Participation	25 %		
Group Presentation	25 %		
Group Presentation	25 %		
Individual Work	25 %		

RE-SIT / RE-TAKE POLICY

ORDINARY CALL

Students pass the subject if the average of their grades, weighted according to the above percentages, is 5 or more.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July. Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year. The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0). After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session. !

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects. ! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program. Once you have made the changes and agree with the modifications, please resend the syllabus using the same method as before.

BIBLIOGRAPHY

Compulsory

- D. Mele. (2020). *Business Ethics in Action.* 2nd edition. Red Globe Press. ISBN 9781137609175 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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PROGRAMMING FOR MACRO-FINANCE

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 PFMF-NBA.1C.f.OPT.M.A

Area Finance

Number of sessions: 25

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 5.0

Semester:

Category: OPTIONAL

Language: English

Professor: **DANIEL ARRIETA RODRIGUEZ**

E-mail: darrieta@faculty.ie.edu

Daniel Arrieta is an Associate professor at IE and Senior Model Validation Quant at Banco Santander where he analyses and validates cross valuation and risk models.

Daniel has held several positions in the finance industry, including Head of Quantitative Modeling at Haitong Bank and Senior Front Office Quant at Espirito Santo Investment Bank, where he validated pricing and risk measurement methodologies and supported the exotic derivatives trading desk. He began his career as a quantitative consultant at the Grupo Analistas.

Daniel has earned a PhD in Mathematical Finance from Universidad Complutense de Madrid, an MSc in Advanced Mathematics from U.N.E.D., and an MSc in Quantitative Finance from Escuela de Finanzas Aplicadas

E-Mail: darrieta@faculty.ie.edu

13.00 to 15.30.

PREREQUISITES

Willingness to work hard, to have a passion for Economics and Finance and to enjoy programming.

SUBJECT DESCRIPTION

This course offers a step-by-step approach to perform top quality macro-finance analysis like in the research departments of many banks and consulting firms.

We will cover the basic concepts of programming using Python. It is an open source interpreted high-level programming language for general-purpose programming. Python has a design philosophy that emphasizes code readability, notably using significant whitespace. It provides constructs that enable clear programming on both small and large scales.

LEARNING OBJECTIVES

The first objective of this course is to equip the students with programming skills in Python. These coding skills transfer well to other software or languages like Ada, C, C++, C#, Fortran, Julia, MATLAB, Perl, etc. The goal of (most) companies is to solve problems efficiently, while the programming language is merely a tool. Our goal is to train students who are able to use computers to solve problems.

The second objective of this course is to train the students with basic skills to manipulate and interpret macroeconomic and financial data.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	32.0 %	40.0 hours
Discussions	8.0 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	24.0 %	30.0 hours
Group work	4.0 %	5.0 hours
Individual studying	32.0 %	40.0 hours
TOTAL	100.0 %	125.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to Python: Set up and integrated development environment (IDE) selection.

SESSION 2 (LIVE IN-PERSON)

Introduction to Python (ii): Familiarizing with the syntax and semantics.

SESSION 3 (LIVE IN-PERSON)

Introduction to Python (iii): Libraries and basic coding.

SESSION 4 (LIVE IN-PERSON)

Introduction to Python (iv): Functions and plots.

SESSION 5 (LIVE IN-PERSON)

Introduction to Python (v): Loops and variables, recursion, modules, and files.

SESSION 6 (LIVE IN-PERSON)

Introduction to Python (vi): Data types and data structures.

SESSION 7 (LIVE IN-PERSON)

Introduction to Python (vii): Testing, debugging, exceptions and assertions.

SESSION 8 (LIVE IN-PERSON)

Introduction to Python (viii): Classes and object-oriented programming.

SESSION 9 (LIVE IN-PERSON)

Financial Time Series (i): dataset preparation and pandas basics.

SESSION 10 (LIVE IN-PERSON)

Financial Time Series (ii): financial data regression analysis.

SESSION 11 (LIVE IN-PERSON)

Financial Time Series (iii): High-Frequency Data.

SESSION 12 (ASYNCHRONOUS)

Mathematical Tools: optimization.

SESSION 13 (ASYNCHRONOUS)

Portfolio analysis and asset allocation.

SESSION 14 (LIVE IN-PERSON)

Portfolio analysis and asset allocation (ii).

SESSION 15 (LIVE IN-PERSON)

Excel integration.

SESSION 16 (LIVE IN-PERSON)

Principal Component Analysis of a yield curve.

SESSION 17 (ASYNCHRONOUS)

Financial Derivatives Valuation Framework.

SESSION 18 (ASYNCHRONOUS)

Financial Derivatives Valuation Framework (ii).

SESSION 19 (LIVE IN-PERSON)

Monte Carlo methodology.

SESSION 20 (ASYNCHRONOUS)

Simulation of Financial Models.

SESSION 21 (ASYNCHRONOUS)

Pricing Financial Derivatives.

SESSION 22 (LIVE IN-PERSON)

Pricing Financial Derivatives (ii).

SESSION 23 (LIVE IN-PERSON)

Application to macro forecasting.

SESSION 24 (LIVE IN-PERSON)

Application to macro forecasting (ii).

SESSION 25 (LIVE IN-PERSON)

Review of the course.

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		
Individual work	40 %		
Class Participation	10 %		

RE-SIT / RE-TAKE POLICY

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Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

Regarding to the newly implemented ´liquid learning´ model, all students must still abide by the same IEU attendance policy, including those students who are connecting remotely to class sessions and not physically in the classroom because they are unable to be physically in Spain, on campus. During the sessions, students connecting remotely are required to fully connect their camera and microphone at all times, and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

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After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

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- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total

of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

 - Guttag, John V.. (2021). *Introduction to Computation and Programming Using Python with Application to Computational Modeling.* Third Edition. The MIT Press. ISBN 9780262542364 (Digital)

 - Hilpisch, Yves. (2019). *Python for Finance.* 2nd Edition. O'Reilly. ISBN 9781492024330 (Printed)

Recommended

 - Oosterlee, Cornelis W. and Lech A. Grzelak. (2020). *Mathematical Modeling and Computation in Finance. With Exercises and Python and MATLAB Computer Code.* First Edition.. World Scientific.. ISBN 9781786347 (Digital)

 - Weiming, James Ma. (2015). *Mastering Python for Finance.* Packt Publishing. ISBN 9781784394516 (Digital)

 - Garita, Mauricio. (2021). *Applied Quantitative Finance. Using Python for Financial Analysis..* First Edition. Palgrave macmillan. ISBN 9783030291402 (Digital)

 - Kelliher, Chris. *Quantitative Finance with Python.* First Edition.. CRC Press. ISBN 978103201443 (Digital)

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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PROJECT MANAGEMENT

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 PM-NBA.1C.n.OPT.M.A

Area Sustainable Development

Number of sessions: 20

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 4.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JOSÉ LUIS PORTELA LÓPEZ**

E-mail: jlportela@faculty.ie.edu

Professor JOSÉ LUIS PORTELA LÓPEZ

Experienced Executive and Renowned Lecturer in Operation, Project Management, Procurement, and Organizational Behaviour.

•Director of the Executive Program "Project Strategic Management" at IE Business School
•CEO Magtalent
•CEO MentoringDirectivo
•Advisor Porsche España Electric vehicle
•Advisor Arvision
•Associate professor at FINANCIAL TIMES / IE CLA. Corporate Learning Alliance
•Operation department Associate professor at IE Business School
•Speaker at Spanish RTVE programa "la aventura del saber"

Executive MBA at IE Business School, Double Engineering degree and Phd in Business administration at Industrial Engineering University of Madrid. (Pending the lecture in 2019).

9 years in Honeywell Security as Strategic Sourcing for Europe, Middle East & Africa. Before I have been Procurement Director for Europe and Operation Director for Southern Europe. (Spain, France and Italy). 9 Years in Pricewaterhousecopers in strategic consulting and business process reengineering in different international projects

My numbers

+ SOCIAL NETWORK

* Linkedin: +.30.000 contacts. up to 32.000 followers
* Owner of the second largest linkedin group in the world about Project Management call "Dirección Estratégica de Proyectos IE Business School". +13.000 members
* Twitter: +8.000 followers
* Klout number +65 (Influencer)

+ IE BUSINESS SCHOOL

* Awarded "the Best Teacher Award Business School IE Open Programs-Executive Education 2009-2010"
* Award for commitment executive education training 2012 at IE Business School
* Special award-company executive in 2014 at IE Business School
* I have been awarded 38 times for academic excellence since 2008 until today.
* Outplacement: + 3.000 mentoring

jlportela@faculty.ie.edu

PREREQUISITES

Understand business strategic

SUBJECT DESCRIPTION

In this world, companies that survive are not the strongest nor the most intelligent, but the most adaptable to change. For this reason, the market demand now more than ever professionals who are capable of understanding the world around us, to be able to define a consistent and robust strategy to implement the necessary changes through well-defined projects and correctly executed

In recent years, we are experiencing major environmental changes that have ever produced, resulting in a new competitive environment affecting all sectors. In this current environment, companies need and demand Project Managers who can strategically plan and manage projects in order to make the necessary changes and thus compete differently.

The company and projects are increasingly linked. Companies need to innovate and therefore do research projects have to be more efficient and thus make improvement projects must adapt to the changing world and therefore make plans to adapt to new technologies or regulations, or they must help others to do so, as in the case of consulting, or as with engineering firms that perform changes in the environment in which we live.

Gone are the days when the success of the projects is only measured by traditional criteria of time and cost. The current criteria measure the value of the investment (VOI) and not just the return on investment (ROI), alignment with the strategy of the Company, the evolving capacity of the solution, the appropriate use of new technologies and their since everything related to corporate social responsibility or the absolute respect for the environment.

Project management is a relatively young and new profession, and as such, with great opportunities for development. The methodologies and doctrines that explain provides enormous benefits in terms of cost, quality and control for companies, besides being a powerful tool for managing organizational change, reasons why more and more companies seeking qualified professionals who can optimally implement it in their daily work.

Undoubtedly, project management there are many books written, most focusing on party planning, cost control, risk management, and the critical path is calculated on a PER diagram etc. Moreover viewing which is aimed course, most of you have experience in managing projects and I'm sure the theoretical part of the project management and have seen several times and although it will be reviewed will be given a expansion with a focus on business school.

Looking at the statistics (not opinions) today still most projects fail in one of its important dimensions, as is time, cost and objectives. So I applied so far not work. From this course you want to take a new approach to teach you to do projects in a different way

In summary I would say that the sessions would run to try a new approach to project management in general

LEARNING OBJECTIVES

The learning objectives are as follows
1. Understand that the world is changing and to define the strategy is not enough. It needs to be implemented
2. Understand the importance of project management within companies
3. Understand PMO and how it works
4. Learn the project management methodology
5. Identify the keys factors to define the project scope
6. Time management
7. Understand how to control the costs of a project
8. Identify the risks of a project and how they are mitigated
9. Understand how a communication plan is made
10. Identify and understand who are and how stakeholders are managed in a project
11. Managing Change
12. Understanding Resistance to Change
13. Manage expectations in a project
14. Identify roles within a team
15. Understand the phases of a team
16. Understand the importance of procurement within projects
17. Understand and apply the concepts of agile methodologies
18. Managing power within projects
19. Knowing how to lead a project
20. Know the importance of the impact on the results of any project

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	5.0 %	5.0 hours
Discussions	10.0 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	50.0 %	50.0 hours
Group work	30.0 %	30.0 hours
Individual studying	5.0 %	5.0 hours
TOTAL	100.0 %	100.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to Project Management

- What is the relation between strategic and project management
- Why is so important project management for your profesional background
- When are you going to use project management

SESSION 2 (LIVE IN-PERSON)

DEFINITION OF PROJECT.
This first session is an introduction to the study of Project Management; What is a project ?

+ Introduction to Project Management.
+ Project management as a critical competency of Business
+ What areas or processes are adequate to undertake projects?
+ Project Phases.
+ What is the objetive of any project?
+ Project Definition.
+ The project management process: knowledge areas of project management (PMBOK)
+ How do you measure the success of a project?

SESSION 3 (LIVE IN-PERSON)

SCOPE MANAGEMENT
The first or one of the first responsibilities of a project manager is to define its scope. What part of our project and what is not included? The reason seems obvious but it is usually one of the major flaws that can make a Project Manager.

- Project Scope.
- How to define objetives
- Scope document

SESSION 4 (LIVE IN-PERSON)

SCOPE MANAGEMENT

Most of the project are over cost, due the fact, there is a change in the scope. It is key to undertand how to control this process

- What does contain the Scope document?
- Scope Change
- Scope change process

SESSION 5 (LIVE IN-PERSON)

TIME MANAGEMENT
The timeliness of the project, along with compliance costs, usually one of the variables that are used most often to evaluate project results and, therefore, the performance of the Project Manager. The most common terms control and new technical developments in this area are reviewed.

- control levels
- Time estimates

- Planning tools
- Critical path
- WBS: Work Brakedown Structure

SESSION 6 (LIVE IN-PERSON)

Agile methodologies
- Understand Agile values and principles, and how to build the discipline to support those principles in your everyday practice
- Appreciate the history of Agile and how the collection of principles and practices came together to enable customer success
- SCRUM

SESSION 7 (LIVE IN-PERSON)

COST CONTROL
In every project we have to be able to In defining the budget. The most important part is how to control after the deviations that occur, and therefore as to monitor the project
- Estimates. How to do it?
- Cost control
- Change scope
- Earned value

SESSION 8 (LIVE IN-PERSON)

QUALITY MANAGEMENT
The quality must be understood as the interpretation of the scope of the project. The key to managing quality is being able to measure and define a KPI that allows us to evaluate
- Quality Management and Projects.
- Prevention and Inspection
- Quality Control.
- Quality Assurance.
- Continuous Improvement.

SESSION 9 (LIVE IN-PERSON)

RISK MANAGEMENT
In an extremely volatile market in which prices or the availability of resources are at best uncertain and where the possibilities of transferring risks are increasingly limited, project risk management is an essential tool for the success of the projects.
- Planning Risk Management.
- Risk Identification.
- Risk Analysis.
- Risk Assessment.
- Risk Management Strategies.

SESSION 10 (LIVE IN-PERSON)

we would discuss in forum the follow

We should have to identify top takeaways of

- Scope management
- Time Management
- Risk management
- Cost management
- Quality management

SESSION 11 (LIVE IN-PERSON)

COMMUNICATION MANAGEMENT
Focus on how through communication can influence the way you manage projects contributing to their success

- Reflection on whether projects fail and why they do
- Curve change management. Another view on the curve change management applied to projects, people and organizations
- Planning communications within the project environment
- Stakeholders. How to identify
- Formula of Change Resistance. Viewpoint teacher jose luis Portela.
- Distribution of information within the environment of projects
- Communication skills.
- Documents. What kind of documents are really needed in the projects?
- Performance reports on projects. Does it really count for something? What are serving?
- Administrative Closure of projects

SESSION 12 (LIVE IN-PERSON)

Forum

We are going to comment about some advertisement. The key element is to check if they are good or not.

SESSION 13 (LIVE IN-PERSON)

RESOURCE MANAGEMENT

1. Understanding the dynamics of the sessions and introduction of the course objectives
2. Introduction to resource management
3. Competitive Advantage. Michael Porter. Analysis of contradiction.
4. How to identify the best profiles.
5. Difference Between Culture and Climate
6. How to organize teams in a more effective way

SESSION 14 (LIVE IN-PERSON)

RESOURCES

7. Golden rules. Dale Carnegie
8. Organizational structures. Its importance when planning the same
9. Understand why projects fail. Analysis of the interests of those involved
10. Acquisition staff
    a. Competition
    b. Troubleshooting
    c. Responsibility
11. How to outsource the company?
12. Management salaries. How important is the wage in the retention of talent?
13. What is the difference between groups and teams?
14. Review Belbin roles
15. What conclusions are drawn from Belbin roles?
16. How do you get a team to be effective?
17. Understand that means the resistance to change
    a. What is it?
    b. How is it prevented?

SESSION 15 (LIVE IN-PERSON)

Read and solve Open Master Case

Practical Case: Masters Series Madrid (OPE010098-U-ENG-HTM)

SESSION 16 (LIVE IN-PERSON)

We are going to discuss why projects fail.

1. Identify key elments
2. Talk about some key examples

SESSION 17 (LIVE IN-PERSON)

Final group presentations

SESSION 18 (LIVE IN-PERSON)

We are going to discuss what you should do if you are the former president of one country to solve Covid19 issue

SESSION 19 (LIVE IN-PERSON)

Review the takeaways of Project Management

SESSION 20 (LIVE IN-PERSON)

Final exam

EVALUATION CRITERIA

The criteria will be the follow:

- Class participation

- Individual test

- Group presentation

criteria	percentage	Learning Objectives	Comments
Class Participation	20 %		class attention
Final Exam	40 %		final test
Group Presentation	40 %		group presentation

RE-SIT / RE-TAKE POLICY
RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July. Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:
? Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).
? It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)
? The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.
? Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3 rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.
! Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.
! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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REAL ESTATE ECONOMICS & FINANCE

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 REEF-NBA.1C.n.OPT.M.A

Area Finance

Number of sessions: 25

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 5.0

Semester:

Category: OPTIONAL

Language: English

Professor: **ROBERTO KNOP MUSZYNSKI**

E-mail: rknop@faculty.ie.edu

PhD, MRICS, MFIA, CESGA

Professional with extensive experience in: financial markets (consultancy, management and risks), banking (management and risks), real estate (management, risks, consultancy and valuation). Extensive teaching activity in national and international postgraduate courses related to finance and real estate. Extensive publication activity in financial matters.

Academic background:

PhD in Economic and Business Sciences in "Banking and Stock Exchange" at the Universidad Autónoma de Madrid. Thesis developed on real estate guarantees: "Determining factors in the quotation and valuation of loans with real guarantee". Rating: Cum Laude. July 2018

Degree in Economics and Business Administration from the Universidad Autónoma de Madrid, specialising in Economic Structure. June 1991.

MFIA Master. Financial Master in Alternative Investments. (Id: 49830)

MRICS: Accredited since October 2017

CESGA (Certiifed ESG Analyst): Accredited since December 2021

Academic experience:

Professor in various courses held during the last thirty one years (1991-2023) in different financial institutions, regulatory institutions, universities, supranational bodies and business school. Topics: finance, capital markets, derivatives valuation, management, risks and real estate.

The classes have been given in Spanish as well as in English. Highlights of the courses are as follows:

Instituto de Empresa: Capital Markets (MIM, Bachelor in Spain and Saudi Arabia-Altamayyuz Programs), Real Estate (MIM, Bachelor in Spain), Real Estate (IMBA).

Edited by Documentation
19th June 2023

Banco Bilbao Vizcaya Argentaria, Banco de España,Banco Interamericano de Desarrollo, Banco Popular, Banco Santander, Banesto, Banif, Bankia, Bolsa de Valores de Colombia, Bulbank (Sofia-Bulgaria), Comisión Nacional del Mercado de Valores (CNMV), Confederación Española de Cajas de Ahorro (CECA), Deusto, Deutsche Bank, Ernest & Young, Escuela de Economía, Escuela de Finanzas Aplicadas, Escuela de Negocios NovaCaixaGalicia, Fundacion Abanca, Fundación de Estudios Financieros, ICADE, IESIDE, IFAES, ING, Instituto Canario de Empresa, Instituto de Crédito Oficial, Instituto de Estudios Bursátiles (IEB), Instituto de Estudios Financieros (IEF), Instituto de Estudios Superiores de Administración (IESA) Caracas-Venezuela, Instituto de Estudios Superiores San Pablo CEU, Instituto Español de Analistas Financieros, Instituto BME, Ministerio de Finanzas Ecuador, Morgan Stanley, Options & Futures Institute, Peat Marwick, Tesoro Público, UNED, Unespa, Universidad de Oviedo, West LB- Düsseldorf, Zurich Insurance.

Professional experience:

Analistas Financieros Internacionales. Head of Data Analytics, (May 2020-currently)
Jones Lang Lasalle Head of Valuations & Senior Advisor (2017- currently)
SAREB (Spanish Bad Bank). Director of Risk and Valuations (2013-2017)
Banesto. Director of Treasury Risks (2008-2013)
Barclays. Director of ALM Risks and structuring (2002-2008)
Santander Bank. Director of Methodologies Market Risk (1996-2002)
Analistas financieros Internacionales: Derivative Instruments analyst (1991-1996)

Monday-Friday: 9:00 AM-18:00 PM

PREREQUISITES

Basic knowledge of financial mathematics as well as macroeconomics and microeconomics, especially with regard to demand and supply functions, is desirable.
Fundamental knowledge of the main economic sectors, their interrelation with the financial sector and their contribution to GDP is recommended.

SUBJECT DESCRIPTION

This subject will cover the fundamental aspects related to investment in real estate assets as well as their financing. The different types of real estate assets and the vehicles through which both direct and indirect investments can be made will be explained. The risks, advantages and disadvantages and general characteristics of the different real estate investments will be identified.

LEARNING OBJECTIVES

The main objectives are to provide the student with all the knowledge that revolves around real estate assets, their impact on the economy, their weight in the portfolios of international investors. The student will be trained in knowledge, valuation, management and impact of real estate assets on the economy and finance.

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	16.0 %	20.0 hours
Discussions	8.0 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	24.0 %	30.0 hours
Group work	12.0 %	15.0 hours
Individual studying	40.0 %	50.0 hours
TOTAL	100.0 %	125.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to real estate

a. History of real estate in International & Types of real estate assets

b. Financial-real estate crisis 2007

SESSION 2 (LIVE IN-PERSON)

Introduction to real estate

c.COVID - Financial-real estate crisis 2020

SESSION 3 (LIVE IN-PERSON)

Introduction to real estate

Types of real estate assets

SESSION 4 (LIVE IN-PERSON)

Introduction to real estate

Real estate and financial sector relationships

SESSION 5 (LIVE IN-PERSON)

Introduction to real estate

Performance & return metrics

SESSION 6 (LIVE IN-PERSON)

Real estate mathematics: Interest rates, curves, discount functions

a. Interest rate basic treatment, conventions and algebra
b. Yield curve analysis
c. Curves treatment

Excel based exercises

SESSION 7 (LIVE IN-PERSON)

Real estate mathematics: Interest rates, curves, discount functions

d. Discount function calculation
e. Forward rate calculations
f. Cash flows treatment for real estate valuation

Excel based exercises

SESSION 8 (LIVE IN-PERSON)

Real estate economics

a. Demand factors

-Elasticity

-Endogenous determinants

-Exogenous determinants

SESSION 9 (LIVE IN-PERSON)

Real estate economics

b. Supply factors

-Elasticity

-Drivers

-New construction profile

SESSION 10 (LIVE IN-PERSON)

Real estate economics

c. Price adjustments

SESSION 11 (LIVE IN-PERSON)

Real Estate Valuation

a. Introduction
b. Types of valuation
c. Real estate valuations methodologies: comparables

SESSION 12 (LIVE IN-PERSON)

Real Estate Valuation

c. Real estate valuations methodologies: discount cash flows

SESSION 13 (LIVE IN-PERSON)

Real Estate Valuation

c. Real estate valuations methodologies: residual value methods

SESSION 14 (LIVE IN-PERSON)

Real Estate Valuation

Case study and groups presentation

SESSION 15 (LIVE IN-PERSON)

Real Estate Valuation

Case study and groups presentation

SESSION 16 (LIVE IN-PERSON)

Capital markets: Financial products linked to real estate assets

a. Mortgages

Excel based exercises

SESSION 17 (LIVE IN-PERSON)

Financial products linked to real estate assets

b. Securitizations (MBS, ABS)

Excel based exercises

SESSION 18 (LIVE IN-PERSON)

Financial products linked to real estate assets

c. Covered bonds

d. Special vehicles

SESSION 19 (LIVE IN-PERSON)

Real estate capital markets

a. The role of real estate in an investment portfolio

Direct Invesments

Indirect Invesments: REITS, ETF and others

b. Real estate investment management

c. The four quadrants

SESSION 20 (LIVE IN-PERSON)

Real estate capital markets

Private debt and equity

a. Traditional mortgage loans

b. Design, risks, and monitoring

SESSION 21 (LIVE IN-PERSON)

Real estate capital markets

Private debt and equity

c. Pricing mortgage loans

d. Non-Bank balance sheet lenders

SESSION 22 (LIVE IN-PERSON)

Real estate capital markets

Private debt and equity

e. Crowdfunding

f. Direct lending

SESSION 23 (LIVE IN-PERSON)

Real estate capital markets

Private debt and equity

g. Non performing loans and portfolio management

SESSION 24 (LIVE IN-PERSON)

Real estate capital markets

Private debt and equity

Real Estate Investments Trustees. REITS

SESSION 25 (LIVE IN-PERSON)

EXAM

The exam will consist of a specific number of multichoice questions that will be weighted equally. There are 4 possible answers with only one being correct. Negative answers will not be deducted.

The questions will be asked one at a time, and it will not be possible to go back and modify the ones previously answered.

EVALUATION CRITERIA

The approach of the subject is eminently practical and both fundamental concepts and practical implementation of everything explained will be evaluated. For this purpose, technical cases will be constantly developed in class with the use of spreadsheets.
The students' ability to implement models that allow the evaluation of real estate investments is valued.

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		
Intermediate tests	10 %		
Individual work	0 %		

Individual presentation	0 %		
Group Work	0 %		
Other	0 %		
Group Presentation	20 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls(ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Ø Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

Ø It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

! Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program

BIBLIOGRAPHY

Recommended

- William J. Poorvu.. *The real estate game..* ISBN 9780684855509 (Digital)
- Peter Linneman. *Real Estate Finance and Investment.* ISBN 9780615825670

(Digital)

- Eric Shapiro. *Modern Methods of valuation..* ISBN 9781138673205 (Digital)

BEHAVIOR RULES

Please, check the University's Code of Conduct [here](). The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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REGULATION OF FINANCIAL MARKETS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 RFM-NBA.1C.n.OPT.M.A

Area Finance

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **EUDALD CANADELL CASANOVA**

E-mail: ecanadell@faculty.ie.edu

Professor: **EUDALD CANADELL CASANOVA**

Eudald Canadell is Director of Research and Statistics at the CNMV (Comisión Nacional del Mercado de Valores), the Spanish financial markets regulatory and supervisory agency. He has spent most of his career working in the international regulatory and financial markets field. He holds a degree in Economics from the University of Barcelona and an MSc in Economics from the University of Minnesota, where he focused on Financial Economics and Econometrics, and taught (T.A) Managerial Economics and Microeconomics. He has also completed advanced management courses at several business schools including the INSEAD (AMP 2008).

Prof. Canadell had been at an early stage of his professional career a director at the CNMV, where he was responsible for economic analysis and international relations, having intervened in the negotiation of several European directives in finance. Subsequently he was appointed Secretary General of IOSCO, a position he held for four years. During his tenure IOSCO developed and approved, among other policies, the first Principles for the Regulation and Supervision of Securities Markets (1998), adopted subsequently by the IMF to assess the quality of regulatory and supervisory systems around the world.

Prof. Canadell has also served as a senior executive at financial markets and international financial companies, including the Financial Derivatives Exchange in Spain (MEFF), and Standard & Poor's Index Services, where he held the position of Managing Director for Europe during 6 years. Subsequently he worked on compliance related matters at a Spanish major bank, and as a senior vice-president at the consultancy Company Compass Lexecon, immediately before re-joining the CNMV.

ecanadell@faculty.ie.edu

Professor: **VÍCTOR RODRÍGUEZ QUEJIDO**

E-mail: vrodriguezq@faculty.ie.edu

Professor: VÍCTOR RODRIGUEZ QUEJIDO

Place and date of birth: Madrid, March 1974

Education and degrees

Master's Degree in Economics and Business, business section, accounting and auditing, UAM – Universidad Autónoma de Madrid (1997)

Complementary training in financial derivatives

Professional activities

Comisión Nacional del Mercado de Valores (CNMV) (Spanish securities markets supervisor)

June 2015 :General Director of Policy and International Affairs

The general directorate includes four departments: Policy and Innovation, Research and Statistics, International Affairs and Resolution of investment firms and Central Counter Parties (CCPs).

Some relevant tasks included that could be highlighted are the following:

- Direct membership of international bodies like a high level committee of the Financial Stability Board (SCSI) and the European Systemic Risk Board (chaired by the European Central Bank President)

- Support and occasional alternate role in the European Securities Markets Authority (ESMA) bodies and in the International Organization of Securities Commissions (IOSCO)

- Member of the governing body of the Instituto Iberoamericano del Mercado de Valores (IIMV)

- Institutional relationships with other governmental areas and with private stakeholders

- Coordination and direction of CNMV's role in the regulatory process

- Fintech (including all matters related to cryptoassets, management of the CNMV's innovation hub and the sandbox)

- Cybersecurity of regulated entities

- Sustainable finance

- CNMV´s strategy and annual plan of activities

- Risks management

- Supervision of benchmarks' administrators and contributing entities

- Financial stability including direct membership of the Spanish macroprudential authority technical committee (chaired by the vice-governor of the Bank of Spain)

- All kind of economic and financial analysis publications

- Cooperation in the relationship with the employees' representatives

- Final responsibility on the CNMV's website

- Financial literacy activities

The position implies being a member of the CNMV's Management Committee and reporting to the Chair, the Executive Committee and the Board on a regular basis.

Around 70 people work directly under the umbrella of the general directorate.

2011-2015   Chief of Staff of the CNMV

Leading a team of 6 people and including the communication and media area and with two consecutive CNMV's Chairs. Member of the CNMV's Management Committee. Member of the committee in charge of the surveillance of the arbitrage process for preference shares. Member of the commission that proposed the new corporate governance code.

June 2006   Technical Secretary of the Advisory Committee of the CNMV

The Advisory Committee is a consultative body that advises the CNMV's Board. It is composed by members representing the different areas of the Spanish financial sector and the regional governments of those regions with a stock exchange.

Its main task is to issue an opinion about every piece of financial regulation proposed by the government or the CNMV before its final approval.

2007 – 2011   Advisor to the Office of the Chairman

As deputy chief of staff.

2001 – 2007   Senior Officer in Market Infrastructures and Accounting

Monitoring the activity of the management companies of the stock exchanges, derivatives and fixed income markets and central securities depositary.

Introduction of the IFRS (International Financial Reporting Standards) in Spain and member of the committee in charge of the official translation.

International committees of accounting and auditing.

2000 – 2001   Officer in the Secondary Markets Department

In charge of the fixed income market supervision and the surveillance of the daily settlement of the central securities depositary.

1999 – 2000   Officer in the Financial Intermediaries Department

Financial intermediaries' solvency supervision.

1998 – 1999   Junior Officer in the Primary Markets Department

Approval of issuances' prospectus.

Grupo CP (consulting group)

1997 - 1998   Consultant (SAP)

Publications and academic activities

·   Member of the FIDE (Fundación para la Investigación del Derecho Empresarial) Foundation Academic Council and Co-director of its Financial Markets Forum.

·   "Criptoactivos: naturaleza, regulación y perspectivas" (Cryptoassets: nature, regulation and perspectives). Observatorio de divulgación financiera (ODF) de la Fundación de Estudios Financieros, November 2019.

·   "El IBEX 35: Una historia de éxito" ("IBEX 35: A Success story"). Economic News May 25, 2017.

·   "Resolución de entidades de contrapartida central: una aproximación en un entorno postcrisis" ("Resolution of central counterparties: Approach in the global regulatory agenda and response in the European Union"), with José Manuel Portero. Revista de Estabilidad Financiera del Banco de España, Num. 29, November 2015.

·   "Hacia un sistema financiero español más equilibrado: el papel de los mercados de valores" ("Towards a more balanced Spanish financial system: the role of the securities markets"), Papeles de la Fundación de Estudios Financieros nº 47, 2012.

· "Transparency in securities markets", with Fernando Restoy. Moneda y Crédito, nº 230, 2010.

· "La nueva estructura de la supervisión financiera europea" ("The new structure of European financial supervision"), with Montserrat Martínez Parera. Quarterly Bulletin, IV 2009. CNMV.

· "La crisis financiera y el valor razonable. Debate en torno a su impacto y evaluación de las medidas adoptadas" ("The financial crisis and fair value. Debate on its impact and evaluation of the measures taken"), with Eduardo Manso. Quarterly Bulletin, IV 2008. CNMV.

· "Cambios en los mercados financieros y su reflejo en España" ("Changes in the financial markets and their reflection in Spain").

vrodriguez@faculty.ie.edu

PREREQUISITES

No prerequisites

SUBJECT DESCRIPTION

This course will focus on the economic principles underlying the regulation and supervision of the financial sector with a particular focus on non-banking sector or activities, and on the interrelations between macroeconomic policy and financial stability from the regulatory perspective.

It will analyze, in particular, those elements of non-bank financial markets regulation and supervision that set it aside from other regulated sectors in the economy, and which are directly associated with the crucial role of this sector in companies´ funding and investment opportunities for all kind of investors.

We will examine in some detail the different pillars of financial markets regulation: conduct of business rules, market and markets´ infrastructures functioning and rules, corporate governance and financial stability, and their different translation in particular into the regulation and supervision of financial markets and their actors, with special attention to the relevant European Directives in this field (Market Abuse Directive, MIFID, etc.)

Financial Stability and Macroeconomic Policy stand nowadays in the core of the work and concerns of regulators, supervisors and politicians around the world, including all the major multilateral international organizations. The Covid – 19 pandemic and the fiscal and monetary measures undertaken by the authorities, with their obvious impact on the soundness of financial institutions and subsequent effects on systemic risk and financial stability, greatly emphasized this trend which, in any case, was already under way before the crisis. Thus, a part of this course will be devoted to the associated issues.

Finally, two major issues are now in the center of attention of the concerns of politicians and financial actors worldwide. Sustainability (which includes climate related but also governance and social issues) and Cryptoassets and FinTech. Naturally, these issues will also be covered.

Financial regulation (globally or partially) arouses significant criticism amongst the industry, interest groups and, last, but not least, academia. We will, thus, time permitting, address some of these criticisms and, in particular, will examine to what extent the benefits of regulation are larger than the costs inflicted by it to participants. We will do this by means of examining costs and benefits of particularly relevant pieces of current regulation

LEARNING OBJECTIVES

The main objective of the course is to complement students acquired knowledge on financial markets, institutions, analytical tools and methodologies with a view and understanding (based on the underlying economic foundations) of the regulatory structure of financial markets and institutions as it relates to financial activity, financial stability and macroeconomic policies

TEACHING METHODOLOGY

The methodology will be a combination of theoretical classes with a number of examples of regulatory or supervisory practice in the various areas of financial markets reguklationb, worldwide but with a particular accent on European regulation and practice. Students will be required to pose questions in class and to be ready to respond to lecturers and colleagues questions or enquiries. Also, pairs of syudents will be expected to develop and present in class a paper/study/ case centered either on a particular example of regulation / market practice / or any other issue relevant in financial markets whith a regulatory or supervisory angle. Finally, there will be a final exam which will cover the complete syllabus, with theoretical and practical questions and a text commentary.

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	29.33 %	22.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	0.0 %	0.0 hours
Group work	26.67 %	20.0 hours
Individual studying	30.67 %	23.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

INTRODUCTION: Principles and goals of financial regulation

Economic foundations of regulation
The overarching goals of financial regulation:
Efficiency in market organization
Integrity in financial markets transactions (conduct of business rules) and in the relationships between financial entities and their clients.
Solvency of the financial system (micro-prudential supervision applied to individual financial entities)
Monitoring the stability of the financial system (macro-prudential supervision, applied to the so-called systemic entities, markets, trading platforms and clearing, settlement and payment systems, etc.)
Regulations common to banking and non-banking activities: Prudential rules for securities markets entities mirroring those applicable to banks, and conduct of business rules applied to banks in their function as providers of investment services

SESSION 2 (LIVE IN-PERSON)

SECURITIES MARKETS REGULATION

In comparison to the banking model and its regulation, the key to the appropriate performance of securities markets and their regulation lies on the availability of complete and verifiable information (disclosure), the transparency in the operations and the strict observance of the conduct of business rules amongst market agents and between them and their clients.

Principles of securities regulation (IOSCO Principles)

SESSION 3 (LIVE IN-PERSON)

PRIMARY MARKETS

Regulation of information contained in prospectuses, accounting standards, relevant information, shareholding, etc.
Debt issues and complex products. Examples (CDS, structured products, swaps, complex derivatives, …)
Credit rating agencies regulation
Regulations applicable to managers and administrators of publicly listed companies
Corporate governance

SESSION 4 (LIVE IN-PERSON)

SECONDARY MARKETS

Regulation of systems and trading mechanisms, exchanges, derivatives exchanges, multilateral trading matching systems, etc.
Prevention and detection of market abuse
Markets´ infrastructure regulation

SESSION 5 (LIVE IN-PERSON)

INVESTMENT SERVICES FIRMS

Regulation of conduct with the clients and in the markets
Review of practices designed to alter the orderly functioning of markets
Best execution
Front-running and client discrimination
Prudential measures applied to financial intermediaries, segregation of clients´ assets
"Know your client" rules, assessment of suitability and convenience of investments offered to clients, fair treatment, disclosure of information provided to clients, advisory services,

SESSION 6 (LIVE IN-PERSON)

COLLECTIVE INVESTMENT VEHICLES

UCITS regulation
Investment Funds and ETFs
Alternative Investment vehicles: Hedge funds, Venture Capital etc.

SESSION 7 (LIVE IN-PERSON)

FINANCIAL STABILITY AND MACROPRUDENTIAL POLICY

Concept of financial stability
Macroprudential policy
Examples of crisis related to systemic risk (the great financial crisis of 2008 and the COVID-19 pandemic)
Entity size, interconnections, complexity, …keys to systemic risk
Macroprudential tools: Specificity and differences with respect to those applied to banking entities

SESSION 8 (LIVE IN-PERSON)

SOURCES OF SYSTEMIC RISK

Interconnectedness, substitution degree, concentration, lack of transparency, hedging, complexity, etc.
The role of confidence
New definitions of financial stability
New principles of IOSCO
Non Bank Financial Intermediation
Money market funds and fixed income funds
Liquidity Management tools and limits to leverage
Securitizations and Asset backed securities in general

SESSION 9 (LIVE IN-PERSON)

MACROECONOMICS AND MACROPRUDENTIAL POLICY IN ACTION

The interactions of macroeconomic shocks, macroeconomic policy (support fiscal and monetary measures, inflation goals, interest rate and money facilities) and financial stability
The interactions between regulatory policy and macroprudential tools and financial stability and its direct effects on macroeconomic stability
The use of microprudential policies for macroprudential goals
Macroprudential policy beyond banking
Macroprudential policy in action: recent developments, challenges and proposals
Architecture of macroprudential policy in particular countries or jurisdictions

International Institutions: ESMA, IOSCO, ESRB, FSB

SESSION 10 (LIVE IN-PERSON)

FINTECH, DLT, CROWDFUNDING

New ways of providing financial services (robo advisors…)
Innovation facilitators (innovation hubs and sandbox)
Crowdfunding
Decentralized finance (DeFi)
DLT impact on trading, clearing and settlement
Future regulation (DLT Pilot)

SESSION 11 (LIVE IN-PERSON)

CRYPTOASSETS

History and nature
Regulatory approaches
AML implications
Advertising
Future regulation (MiCA)

SESSION 12 (LIVE IN-PERSON)

SUSTAINABILITY AND CLIMATE RELATED ISSUES

Information disclosures for public companies (double materiality) and financial intermediaries (on products and when providing investment advice)
Taxonomy and classification of economic activities
Data: third party data providers and ESG ratings

SESSION 13 (LIVE IN-PERSON)

Current topics (among others and as examples) in Financial markets regulation:

1.   Benchmarks: interest rates, indices and other benchmarks in international markets. Crucial benchmarks: LIBOR, EURIBOR and new free risk interest benchmarks. Supervision scheme

2. ·   Corporate governance for financial entities, remuneration, incentives, corporate responsibility

SESSION 14 (LIVE IN-PERSON)

 Group assignment presentations

SESSION 15 (LIVE IN-PERSON)

 Group assignment presentations

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Final Exam	40 %		
Individual presentation	0 %		
Group Presentation	0 %		
Individual work	0 %		
Group Work	40 %		
Class Participation	20 %		
Intermediate tests	0 %		
Other	0 %		

RE-SIT / RE-TAKE POLICY
Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July. Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year. The Extraordinary Call Evaluation criteria will be subject to the following rules:

 Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year).

The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0). After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

BIBLIOGRAPHY
Recommended
 - John Armour, dan Awrey et al. (2016). *Principles of Financial regulation.* 1st edition. Oxford University Press. ISBN 9780198786481 (Printed)
BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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REPORTING KPIS USING EXCEL AND BUSINESS INTELLIGENCE TOOLS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 RKPI-NBA.1C.n.OPT.M.A

Area Accounting and Management Control

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JUAN DOMINGUEZ JIMENEZ**

E-mail: jdominguezj@faculty.ie.edu

Professor JUAN DOMINGUEZ JIMENEZ

Academic Qualifications

- Ph. Doctorate in Business Administration (DBA), Nebrija University, 2010
- Master in Business Administration (MBA), EOI Business School, 1995
- B.Sc. in Economics and Business Administration, Universidad Autónoma Madrid, 1992

Academic Experience

- Adjunct Professor, IE University, 2016-present
- Adjunct Professor of Finance and Accounting and Program Coordinator, CUNEF, 2009-present

Fields of interest

- Financial Accounting, Managerial Accounting, Business Planning, International Corporate Finance

Professional Experience

- Independent business advisor, 2015-present

- Head of Carrier Services at Vodafone, 2014-2015

- Wholesale Business and Interconnection Director at ONO, 2013-2014

- Director of Business Control at ONO, 2010-2012

- TV Operations Director at ONO, 2005-2010

- General Manager Estreno Digital at Grupo AUNA 2001-2005

- CFO at Estreno Digital at Grupo AUNA 2000-2001

- Controller at Uno-e Bank at BBVA 1999-2000

- Controller / Treasurer at Hewlett-Packard. 1995-1999

PREREQUISITES

A basic background and command in Excel is MANDATORY.
Knowledge of the basic management control concepts and techniques is desirable.

SUBJECT DESCRIPTION

Information Systems have evolved rapidly in recent years, bringing a new vision not only in the quantity and form, but in the time in which businesses obtain the necessary information to make decisions and to report business performance.

This course shows how Excel can help a business to improve its business performance reporting. Using a hands-on method, the course covers the main reporting capabilities of Microsoft Excel. The course provides also an introduction to Power BI.

LEARNING OBJECTIVES

This course objectives are:

- Know the different reporting capabilities of Microsoft Excel for Windows.

- Understand the basics about how to design a KPI, an operational dashboard and a balance scorecard.

- Design and prepare a final project using the covered reporting tools

- Introduction to Microsoft Power BI (understanding the difference with Microsoft Excel).

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	24.0 %	18.0 hours
Discussions	0.0 %	0.0 hours
Exercises in class, Asynchronous sessions, Field Work	21.33 %	16.0 hours
Group work	33.33 %	25.0 hours

Individual studying	21.33 %	16.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

INTRODUCTION TO BUSINESS REPORTING IN EXCEL

Importance of business reporting in management control, and introduction to Excel as a business reporting tool.
Preparing a Mac computer to use Excel for Windows
Understanging the main functionalities of Tables, and Pivot Tables

SESSION 2 (LIVE IN-PERSON)

DATA MODELLING IN EXCEL

Pivot Query and Power Pivot
Introduction to relational databases

SESSION 3 (LIVE IN-PERSON)

DEFINING MEASUREMENTS AND KPIS

Power Pivot functionalities: tables, relations, hierarchies, date/time table, calculated columns, measures and KPIs

SESSION 4 (ASYNCHRONOUS)

OFFLINE ACTIVITY 1

Offline activity to practice data modelling using Excel Power Pivot

SESSION 5 (LIVE IN-PERSON)

DATAVISUALIZATION IN EXCEL

Pivot Tables customization, Slicers and Timelines, Pivot Charts
Designing a scorecard in Excel

SESSION 6 (LIVE IN-PERSON)

DATA MODELLING IN POWER BI

Learning how to use Microsoft Power BI (differences with Excel)

SESSION 7 (LIVE IN-PERSON)

DATAVISUALIZATION IN POWER BI

Learning how to use Microsoft Power BI (differences with Excel)

SESSION 8 (ASYNCHRONOUS)

OFFLINE ACTIVITY 2

Offline activity to practice score design using Power BI

SESSION 9 (LIVE IN-PERSON)

FINAL PROJECT: DEFINITION

Final project definition: objective, data to be used, KPIs design and excel functionalities to be used
Recapitulation and additional exercises

SESSION 10 (LIVE IN-PERSON)

FINAL PROJECT: PLANS REVIEW

Final project plans review
Recapitulation and additional exercises

SESSION 11 (LIVE IN-PERSON)

FINAL PROJECT: STATUS

Final project status
Recapitulation and additional exercises

SESSION 12 (LIVE IN-PERSON)

FINAL PROJECT: FINAL REVIEW

Final project final review

SESSION 13 (ASYNCHRONOUS)

OFFLINE ACTIVITY. WORKING ON THE FINAL PROJECT

Offline activity to complete the final projects

SESSION 14 (LIVE IN-PERSON)

FINAL PROJECT

Final project presentations

SESSION 15 (LIVE IN-PERSON)

FINAL PROJECT

Final project presentations

EVALUATION CRITERIA

OFFLINE ASSIGNMENTS

Offline assignments will require students to complete exercises about the contents covered at class.

FINAL PROJECT

In the last part of the course the students (organized in groups) will have to design and prepare a final project that will cover the course content and that will represent 80% of their final grading.

criteria	percentage	Learning Objectives	Comments
Final project	80 %		
Offline assignments	20 %		

RE-SIT / RE-TAKE POLICY
RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July. Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:
- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).
- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)
- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.
- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

! Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

- Marco Russoa and Alberto Ferrari. (2020). *The Definitive Guide to DAX.* Second edition. Pearson Education, Inc.. ISBN 1397815090697 (Digital)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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RISKS IN THE INTERNATIONALIZATION OF COMPANIES : COUNTRY RISK

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 RICC-NBA.1C.n.OPT.M.A

Area Economics

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **NOEMI DANS RODRIGUEZ**

E-mail: ndans@faculty.ie.edu

Professor NOEMI DANS RODRIGUEZ

https://www.linkedin.com/in/noemi-dans-8199b918/?originalSubdomain=es

Academic Background

- PhD Cum Laude in Economics. UCM
- Master Degree in International Economics, UCM

Professional Experience

- CESCE (Spanish Export Credit Agency): Deputy Director
- CESCE: Head of International Relations and Country Risk
- OECD: Member of the "Group of Country Risk Experts of the OECD"
- Berne Union (the Export Credit Agencies Association): Member of the Technical Committee and of the Investments Committee

Academic Experience

- Researcher at Euro.Mediterranean University Institute, UCM, Madrid
- Professor, IE University, Madrid.
- Professor, Escuela de Riesgos Banco Santander
- Associate Professor, Universidad Pontifica de Comillas, Madrid
- Associate Profesor, Universidad Complutense de Madrid,

Some online papers

- http://sem-wes.org/sites/default/files/revistas/01_DANS.pdf
- https://revistas.ucm.es/index.php/PADE/article/view/48672
- http://revistas.ucm.es/index.php/PADE/article/view/41100

- http://universidadeuropea.es/myfiles/pageposts/jiu/jiu2012/pdf/ix_jiiu_2012.pdf#page=167
- Research Interests: Country risk, foreign direct investment, credit risk
    ndans@faculty.ie.edu

PREREQUISITES

None. The knowledge acquired in previous economics subjects will help.

SUBJECT DESCRIPTION

Some events occurred in the last decades such as the global crisis, terrorism, populist policies in LATAM, Europe and USA, the debt crisis in the EU or the Arab Spring have caused a generalized increase in Country Risk. According to the World Bank, the main multinationals and insurers foresee an increase in socio-political and macroeconomic risks in the coming years. Country risk is among the main obstacles for the international activity.

Since the beginning of the global crisis in 2008, we are used to talking about the spread in debt markets, but country risk also affects trade and direct investment. In the decision-making process, for a proper risk management to be done it is essential to i) know the risks and the factors that cause them, ii) handle the most rigorous ratings iii) learn the mechanisms of mitigation and risk transfer available in the market.

LEARNING OBJECTIVES

After completing this course, students will be capable of analyzing and understanding economic and sociopolitical events and their effect on multinationals. Students will be capable of identifying the different modalities of country risk that can affect their companies and of making their own assessment. They will know how to manage those risks by using the mitigation and risk transfer tools available in the market.

For this, the risk assessment methodologies of the OECD, Standard & Poor´s and Export Credit Agencies will be analyzed.
Analytical treatment of the underlying theory will be kept as simple as possible and the course will have a strong practical orientation. Students will work through the course on a case study project that will require to develop a country risk assessment and a comparative analysis for two specific countries.

Students are expected to acquire the following skills:

Cognitive:

- Capacity to frame information, academic or journalistic, on international economic and financial events in a global vision and in the theoretical debates on country risk.
- Capacity to write analysis, reports and studies on various aspects of economic, sociopolitical dimensions.

Instrumental:

- Use and interpretation of Index numbers
- Capacity to abstract and work with simplified versions of reality
- Familiarity with databases
- Ability to interpret and communicate financial arguments and financial analysis in precise and

concise manner

Attitude:

- Think critically about the limits of financial integration and be able to question experts' assessments with sound arguments
- Be open to different views and arguments regarding financial events

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	29.33 %	22.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	13.33 %	10.0 hours
Group work	26.67 %	20.0 hours
Individual studying	17.33 %	13.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Presentation

The concept of Country Risk

In this chapter, we study which events can generate losses for international trade, for banks financing exports and for foreign companies operating abroad. The different types of country risk are analyzed according to the social, political and macroeconomic factors that generate them.

Readings and practices will be provided in the course

SESSION 2 (LIVE IN-PERSON)

The concept of Country Risk

In this chapter, we study which events can generate losses for international trade, for banks financing exports and for foreign companies operating abroad. The different types of country risk are analyzed according to the social, political and macroeconomic factors that generate them.

Readings and practices will be provided in the course

SESSION 3 (LIVE IN-PERSON)

Country Risk in Exports

Country risk in exports is derived from the capacity of payment. The following types of risks are analyzed:

- Tranfer risk
- Convertibility risk

- Political violence risk
- Sovereign risk

Readings and practices will be provided in the course

SESSION 4 (LIVE IN-PERSON)

Country Risk Assessment in Exports

Country risk in exports is derived from the capacity of payment. The following types of risks are analyzed:

- Tranfer risk
- Convertibility risk
- Political violence risk
- Sovereign risk

Readings and practices

SESSION 5 (LIVE IN-PERSON)

Country Risk Assessment in Exports

Country risk in exports is derived from the payment capacity. The following types of risks are analyzed:

- Tranfer risk
- Convertibility risk
- Political violence risk
- Sovereign risk

Readings and practices will be provided in the course

SESSION 6 (LIVE IN-PERSON)

Country Risk Assessment in Foreign Direct Investments

The following types of risks are analyzed. For those risk similar to risks in exports a comparative analysis will be carried out.

- Transfer and convertibility risk in FDI
- Political violence risk in FDI
- Expropriation risk
- Breach of contract

Readings and practices will be provided in the course

Article: Country Risk in Foreign Direct Investment: Similarities and differences with country risk in exports. (Nómadas. Revista Crítica de Ciencias Sociales y Jurídicas Volumen Especial: Mediterranean Perspectives | 49 (2016)) (CED)

SESSION 7 (LIVE IN-PERSON)

Country Risk Assessment in Foreign Direct Investments

The following types of risks are analyzed. For those risk similar to risks in exports a comparative analysis will be carried out.

- Transfer and convertibility risk in FDI

- Political violence risk in FDI
- Expropriation risk
- Breach of contract

Readings and practices will be provided in the course

Article: Country Risk in Foreign Direct Investment: Similarities and differences with country risk in exports. (Nómadas. Revista Crítica de Ciencias Sociales y Jurídicas Volumen Especial: Mediterranean Perspectives | 49 (2016) © EMUI) (CED)

SESSION 8 (LIVE IN-PERSON)

Country Risk Assessment in Foreign Direct Investments

The following types of risks are analyzed. For those risk similar to risks in exports a comparative analysis will be carried out.

- Transfer and convertibility risk in FDI
- Political violence risk in FDI
- Expropriation risk
- Breach of contract

Readings and practices

SESSION 9 (LIVE IN-PERSON)

Country Risk Assessment Methodologies and Ratings

Three different methodologies of country risk assessment are studied.

- OECD Model (Group of Experts in Country Risk of the OECD)
- Export Credit Agencies
- Standard & Poor´s.

Readings and practices will be provided in the course

SESSION 10 (LIVE IN-PERSON)

Country Risk Assessment Methodologies and Ratings

Three different methodologies of country risk assessment are studied.

- OECD Model (Group of Experts in Country Risk of the OECD)
- Export Credit Agencies
- Standard & Poor´s.

Readings and practices will be provided in the course

SESSION 11 (LIVE IN-PERSON)

Country Risk Assessment Methodologies and Ratings

Three different methodologies of country risk assessment are studied.

- OECD Model (Group of Experts in Country Risk of the OECD)
- Export Credit Agencies
- Standard & Poor´s.

Readings and practices will be provided in the course

SESSION 12 (LIVE IN-PERSON)

Workshop: Student´s Comparative Analysis of Country Risk

This chapter consists of a workshop in which students compare the ratings of the main countries of each geographical area and explain them with the socio-political and macroeconomic arguments that determine the level of risk.

- LATAM (Except Emerging Economies)
- MENA
- EMERGING ECONOMIES
- ASEAN 5
- SUB-SAHARAN
- POST SOVIET STATES (Former USSR)
- MIDDLE EAST

Materials will be provided

SESSION 13 (LIVE IN-PERSON)

Country Risk Management: Risk Insurance

In the last chapter of the program, students learn to manage the country risk they will face in the business decision making processes. The students will learn the insurance mechanisms available in the market to be able to efficiently manage them.

- Credit Risk and Political Risk Insurance
- The Global Insurance Industry
- Export Credit Agencies (ECAs)
- Berne Union
- OCDE Consensus
- Private Insurers: ICISA
- Most Frequent Insurance Schemes

Readings and practices will be provided in the course

SESSION 14 (LIVE IN-PERSON)

Final Project presentations and debates

SESSION 15 (LIVE IN-PERSON)

Final Quiz : Multiple Choice

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Quiz	40 %		It will consist of M-C questions. Requirement for passing the course: a minimum of 4 over 10 in the final exam

Group Presentation	40 %		Group Work. Instructions will be handed out in a separate document
Class Participation	20 %		Two main criteria will be used in reaching judgment about your class participation: frequency and quality of your contributions to class summaries, practices and debates.

RE-SIT / RE-TAKE POLICY
RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

Online students are required to fully connect their camera and microphone at all times , and must actively participate during the sessions (using all necessary audiovisual equipment)

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Ø Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

Ø It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

Ø The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Ø Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

! Students **failing more than 18 ECTS credits** after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

Please, check the University's Code of Conduct [here](). The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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SERVICE DESIGN: GOOD DESIGN IS GOOD BUSINESS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 SDGD-NBA.1C.p.OPT.M.A

Area Design and Management

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **KEUNWOO KIM**

E-mail: kkim@faculty.ie.edu

Adjunct Professor, IE Business School

As a multi-disciplinary professional, Knu brings over 15 years of experience in brand ownership, design strategy, creative direction, and photography to the table. His educational background includes a Bachelor's degree in Business Management and Economics from Handong Global University in Korea, as well as an MBA from IE Business School in Madrid.

His career started at LG International in Germany, where he spent 5 years in business development and corporate strategy. Following his MBA, he joined Fjord as a Business Designer, where he leveraged his expertise in business and design to create impactful design solutions. As an adjunct professor at IE Business School and IE University, he has also had the opportunity to share his knowledge and experience with students.

Outside of his professional pursuits, Knu is also an entrepreneur, having built his own shoe brand from the ground up. In this role, he is responsible for branding, strategy, art direction, and design. His passion for design is fueled by a belief in its power to make a real impact on society and effect meaningful change.

As an ambidextrous brain, Knu is equally at home working with creativity and analytics, and he has also built a career in photography. He is constantly seeking new ways to challenge himself and expand his skillset, all while remaining focused on the potential of design to transform the world around us.

- Connect on Linkedin
- Check out his brand and photography work
  kkim@faculty.ie.edu

PREREQUISITES

There are no mandatory prerequisites. Concepts, abilities, processes, and knowledge a candidate for an BBA student must be sufficient in order to effectively follow the development of the subject within the context of their educational career. Even though, we expect a willingness to learn, an insatiable curiosity about everything and proactiveness in class.

SUBJECT DESCRIPTION

The role of design in business has evolved significantly in recent years, with many corporations incorporating design methodologies in various areas from customer experience to innovation. Design in Buisness Good Design is Good Business course provides an overview of design methodology and how it can be used to provide relevant products and services to end customers. The course will guide students through the first steps of designing a better business.

LEARNING OBJECTIVES

This course aims to provide students with an understanding of the powerful impact that design can have on business strategy. By introducing service design methodology and tools, the course explores an alternative approach to traditional business practices. Students will learn about personas, service blueprints, and various business design aspects, allowing them to connect experience design with the impact on business. The course includes both theoretical lectures and hands-on practical exercises, as well as interactive workshops.

- Understand the importance of design in business.
- Learn basic design methodologies and principles.
- Apply design thinking to business challenges.
- Use design to enhance customer experience and drive innovation.
- Develop strategies to create relevant products and services.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	26.67 %	40.0 hours
Discussions	13.33 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	33.33 %	50.0 hours
Group work	20.0 %	30.0 hours
Individual studying	6.67 %	10.0 hours

TOTAL	100.0 %	150.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Design matters These essions aim to provide an introduction to the role of design in a business context, covering general concepts that go beyond traditional design areas. Students will learn about the importance of considering not only the end-user but also their context in order to better understand their specific needs. The class will also cover a case study titled "VanMoof: Delivering" which focuses on developing a unique experience design case.

Collaboration is a critical aspect of the design process. In order to facilitate this, students will start by introducing themselves individually. Then, they will form groups to work throughout the course and develop a group canvas to set their goals, objectives, values, and methods of collaboration.

* Prior reading is not required for this session.

SESSIONS 3 - 4 (LIVE IN-PERSON)

Design methodology & Creative Brief

During the first session, students will learn about the theory and history of design methodology. In the second session, a new approach to framing challenges will be introduced. Before attempting to solve a problem, it's essential to ensure that the challenge is correctly framed. This involves focusing on the "Why" questions rather than just the "What" questions.

Towards the end of the session, the class will discuss a challenge that will be worked on throughout the entire course using the methodology that will be taught.

SESSIONS 5 - 6 (LIVE IN-PERSON)

Design Research Introduction & Research Plan

At the core of human-centered design is a deep understanding of the users and stakeholders involved in a challenge. Research is crucial when applying a human-centered design methodology as it informs every decision and brings the user's voice to the design process. As the saying goes, "It is research that prevents us from designing for only one user: ourselves."

This session will provide students with a fundamental introduction to design research, emphasizing its importance in preventing designers from solely relying on their own experiences and perspectives. Detailed research tools will also be introduced to help students better understand user needs.

Design tools to learn:

1. Empathy mapping (Behavioural, emotional, environment, fears, needs, wants...)
2. How to identify needs and jobs to be done

SESSIONS 7 - 8 (LIVE IN-PERSON)

Research tool - 1 on 1 User Interview

Research tools are critical means to understand users' needs, behaviors, and motivations, as well as to validate assumptions and solutions. In the first session, we will discuss one of the most crucial design research tools: the 1 on 1 interview. Students will learn about what the 1 on 1 interview is and how to prepare for it.

In the second part of the session, students will engage in a practical exercise to set the structure of their interview script by identifying their assumptions and questions. They will also define the key topics to be addressed during the interviews and their objectives.

Assignment 1: Due by Session 11-12

Article: Complete Beginner's Guide to UX Research (UX Booth)

SESSIONS 9 - 10 (LIVE IN-PERSON)

Research tool - writing interview script

When conducting in-depth user interviews, it is essential to prepare a solid interview script to ensure that everyone in the group is aligned and ready. In the first session, we will cover different types of questions and exercises to help students create a comprehensive interview script by identifying their questions and assumptions.

Conducting user interviews

In the second session, students will learn how to conduct a 1 on 1 interview and practice with their colleagues. This session will focus on the necessary skills to conduct effective interviews, including active listening and follow-up questioning. Students will also receive feedback from their peers to improve their interviewing techniques.

SESSIONS 11 - 12 (LIVE IN-PERSON)

Sharing & Iterating Interview Script

The session will begin with students sharing their interview scripts to receive feedback from others. Students will also develop additional exercises to enrich their interview scripts.

Customer Journey AS-IS

A customer journey provides a visual representation of a customer's end-to-end experience with a service, product, or brand. It includes not only "steps where a customer is interacting with a company, but reveal the key steps of an experience"[1] This tool is instrumental in identifying moments of delight, moments of frustration, and gaps in the user experience. By understanding the user experience, potential solutions can be explored to improve it.

In this session, students will be introduced to customer journeys as a human-centered tool that goes beyond just documenting customer interactions with a company. Case studies will be presented to help students better understand the concept, and they will also have the opportunity to build their own customer journeys based on the user information gathered through design research. This activity is a critical design artifact that will help students identify areas of improvement and develop solutions to enhance the user experience.

1. Source: This Is Service Design Doing by Adam Lawrence, Jakob Schneider, Marc Stickdorn, and Markus Edgar.

SESSIONS 13 - 14 (LIVE IN-PERSON)

Download, Synthesis and Insights

The first part of this session will focus on downloading information and synthesizing research findings effectively. Students will learn how to create meaningful insights that can serve as the basis for ideation. This is a critical step in the design process, as it enables designers to understand user needs and design solutions that meet those needs.

Assignment 2: Due by Session 13-14

Customer Journey AS-IS - Practice

In the second part of the session, students will have the opportunity to practice building their own Customer Journey AS-Is using the information they have gathered through their research. This hands-on activity will help students visualize the end-to-end experience of a customer with a service, product, or brand and identify areas for improvement.

SESSIONS 15 - 16 (LIVE IN-PERSON)

Insights Report Presentation

In this session, students will have the opportunity to present their insights report, which is the culmination of their design research. The insights report will include a summary of their research findings and the insights they have gathered from their research. They will also discuss their approach to the research and any challenges they encountered during the process. It serves as a starting point for ideation and the development of potential solutions to the design challenge.

Brainstorming

Students will move from insights to ideation. Using the insights gathered from their research, they will brainstorm ideas and create the foundation for potential solutions. Students will work collaboratively to generate a wide range of ideas, focusing on quantity rather than quality at this stage. They will use various ideation techniques to stimulate creativity and generate new perspectives.

Quiz 1

SESSIONS 17 - 18 (LIVE IN-PERSON)

From ideas to solutions & Round Robin

In these hands-on sessions, students will take the ideas generated during the previous session and develop them into solid concepts using a framework.

Students will work in groups to build their concepts, incorporating the insights gathered from their research and the feedback received during the ideation phase. They will use a structured approach to develop their solutions, ensuring that they meet the needs of the users and address the design challenge.

Once the concepts are developed, students will engage in a Round Robin feedback activity. This will involve sharing their concepts with other students and receiving feedback from them. The feedback will be used to iterate and refine their solutions, ensuring that they meet the needs of the users and are feasible to implement.

SESSIONS 19 - 20 (LIVE IN-PERSON)

Business Design

In this session, students will focus on ensuring the viability of the solutions they have developed. They will use the value proposition and business model canvas to hone the business model of their potential solutions.

By developing a clear value proposition and business model, students can ensure that their solutions are financially feasible and have a strong value proposition for both the users and the business. This is a critical step in the design process, as it ensures that the solutions are viable in the real world and can be implemented successfully.

Branding

In the second session, students will also learn about the key elements of branding by conducting branding exercises. Through these exercises, students will gain an understanding of the importance of branding in creating a strong and recognizable identity for a product or service. They will learn about how to define a brand strategy and different elements of branding, such as logo, color, typography, and messaging.

Students will work collaboratively to develop a brand identity for their solutions, incorporating the insights gathered from their research and the feedback received during the ideation phases.

SESSIONS 21 - 22 (LIVE IN-PERSON)

Prototyping

The objective of this session is to provide students with an understanding of prototyping as a concept and the different ways to prototype. During this theoretical session, we will examine real-life case examples of prototyping using different tools and methods for different purposes, such as services and products, both digital and physical.

We will also discuss the benefits of creating prototypes, including the ability to quickly test and iterate solutions and gain feedback from users. We will explore the concept of a "minimum lovable product," which is a prototype that has just enough features to be functional and lovable by users.

In the second session, students will have the opportunity to develop the first version of their own Lo-Fi prototype. They will use the ideas and concepts generated during the previous sessions to create a low-fidelity prototype that can be tested and refined. This hands-on activity is a critical step in the design process, as it allows students to test their solutions and make adjustments before investing in the development of a high-fidelity prototype or final product.

SESSIONS 23 - 24 (LIVE IN-PERSON)

Prototype Presentation, Feedback and Iteration

In this session, students will have the opportunity to present their prototypes and receive feedback from their peers. They will share their prototypes in a clear and concise manner, highlighting the key features and benefits of their solution.

Feedback from other students will help them identify areas for improvement and refine their prototypes. Students will continue to iterate their solutions based on the feedback received and prepare high-fidelity prototypes.

Customer Journey TO-BE & Service Blueprint

Once the viability side is constructed, students will move on to designing the ideal customer journey for their solutions. They will build the steps of the end-to-end experience, incorporating the insights gathered from their research and the feedback received during the ideation phase. Students will also be introduced to a more comprehensive service design tool, the Service Blueprint. This tool allows students to map out the entire service experience, from the front-stage interactions with the user to the back-stage processes and systems that support the service delivery.

SESSIONS 25 - 26 (LIVE IN-PERSON)

User testing

Design is a continuous iteration process, and user testing is a critical step in the design process to ensure that the final solutions meet the needs of the users. In this session, students will learn how to test their Low fidelity prototypes with users and gather feedback that can be used to refine and improve their solutions. Students will be introduced to various user testing tools and methods. They will learn how to choose the appropriate user testing method based on their design challenge and how to develop user testing materials, such as test scripts and interview questions.

In the second session, students will work on building the materials for user testing, tailored to the context of their prototype. This will include developing test scripts, interview questions, and surveys that can be used to gather feedback from users.

Quiz 2

SESSIONS 27 - 28 (LIVE IN-PERSON)

Sharing user testing results

In this session, students will have the opportunity to present the key learnings and findings from their user testing activities. They will discuss how the feedback gathered from users has informed their design decisions and how they plan to iterate and improve their final solutions based on the feedback received.

Design Matters - Recap

Following the user testing presentations, students will have a recap of the key design methodologies and tools learned throughout the course. They will reflect on what they have learned, how they have applied the tools and methodologies in their projects, and how they plan to use these skills moving forward. It allows students to reflect on their design journey, celebrate their successes, and identify areas for growth and improvement. By reflecting on their learning, students can consolidate their knowledge and skills and use them to tackle future design challenges.

SESSIONS 29 - 30 (LIVE IN-PERSON)

Shoecase: Final Presentations

In the final session, students will have the opportunity to present the final result of their project work. They will showcase their solutions and discuss their design process, including the research, ideation, prototyping, user testing, and iteration phases. The presentations will be given in front of the professor and peers, who will provide feedback and ask questions about the solutions and the design process. This feedback will help students reflect on their work and identify areas for improvement.

The grading guidelines for the project work will be defined in the EVALUATION SYSTEM in Section 6 of the syllabus.

EVALUATION CRITERIA

A. CLASS PARTICIPATION (20%)

Three main criteria will be used in reaching judgment about your class participation:

- <u>Depth and Quality of Contribution:</u> The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

- <u>Moving Your Peers' Understanding Forward:</u> Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

- <u>Frequency:</u> Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

B. Individual Quiz (20%)

There will be two quizzes designed to test and reinforce students' understanding of the key concepts and principles of the design methodologies covered in the course

C. ASSIGNMENT 1 (15%): PREPARING AN INTERVIEW SCRIPT

This assignment is a group assignment done in groups outside of session hours. Each group needs to write a user interview script according to the session 4.

Evaluation criteria (15 points, 5 points each)

1. Quality of questions.
2. Overall structure, topics and objectives.
3. Creativity / exercises.

D. ASSIGNMENT 2 (15%): INTERVIEW AND KEY INSIGHTS

This assignment is a group assignment done in groups outside of session hours. Each gruop turns in a document that highlights key insights from the interviews.

Evaluation criteria (20 points, 5 points each)

1. Quality & quantity of insights.
2. Relevant quotes & other supporting materials.
3. Story telling.

E. FINAL GROUP PRESENTATION (30%)

You are also expected to complete a final project with your group and present it face to face at the last session. The project will give you the opportunity to reflect on what you have learnt in class and apply it to some practical problems. More details of the project will be provided by the start of the course.

Evaluation criteria (30 points, 5 points each)

1. Desirability: Does the solution address the user problem? Does the user want to use it?
2. Viability: Is the solution reasonable to succeed or capable of achieving your goal?
3. Feasibility: Could the solution be easily implemented? Is the technology available or easy to be developed?
4. Design process: Did the team use an adequate design approach/process to discover relevant insights and define the right solution?
5. Quality of presentation: Does the team illustrate the solution clearly and creatively?
6. Time (6 mins presentation + 2 mins Q&A): Is the presentation finished within the time?

Overall Grading

- Sobresaliente/Outstanding: 9.0-10.0 (A to A+). Consistently produces work of the highest quality and craft; exhibits notable progress and development over the course of the semester; meets all course objectives at highest level; attendance is near-perfect, and contributions to course discussions are extremely valuable.
- Notable: 7.0-8.9 (B to B+). Completes all assignments with work of above-average quality and craft; exhibits significant progress and development; meets most course objectives; attendance and participation are very good.
- Aprobado: 6.0-7.0 (C to C+). Completes all assignments with work of acceptable quality and craft; exhibits some progress and development; meets a majority of course objectives. Attendance and participation are acceptable.
- Aprobado: 5.0-6.0 (D). Assignments are delivered but are incomplete and/or of low quality and craft; exhibits little progress and development; meets few course objectives. Attendance and participation are poor, but absences do not total more than 30%.

- Suspenso: 0-4.9 (F). Work is incomplete, missing, or does not meet course objectives. Attendance and participation are poor.
- Automatic Failure/Suspenso: 0 (F). Please note that a student who misses 30% or more of the scheduled sessions receives an automatic 0.0, and loses his or her right to the second "convocatoria."

criteria	percentage	Learning Objectives	Comments
Quiz	20 %		
Assignment 1	15 %		
Assignment 2	15 %		
Final Presentation	30 %		
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

All students must abide to the attendance policy for AY 2021-22 where physical (in-person) attendance to class is compulsory for all regular Face-to-Face courses. Those students who, due to exceptional cases (that have been pre-approved by IE), are connecting remotely to class sessions and not physically in the classroom are required to fully connect their camera and microphone at all times , and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).
- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)
- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.
- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is

10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

- Tim Brown. *Change by Design.* Harper Collins. ISBN 9780062856623 (Printed)
- Jakob Schneider and Marc Stickdorn. *This is Service Design Thinking..* Wiley. ISBN 9781118156308 (Printed)
- Adam Lawrence, Jakob Schneider, Marc Stickdorn, and Markus Edgar. *This Is Service Design Doing.* O'Reilly Media, Inc. ISBN 9781491927182 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

Please, check the University's Attendance Policy here. The Program Director may provide further indications.

ETHICAL POLICY

Please, check the University's Ethics Code here. The Program Director may provide further indications.

SOCIAL ENTREPRENEURSHIP

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 SE-NBA.1C.n.OPT.M.A

Area Others

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **RACHIDA JUSTO**

E-mail: rjusto@faculty.ie.edu

RACHIDA JUSTO

Dr. Justo is Associate Professor of Entrepreneurship at IE University and head of the Impact Bridge-IE Chair of Social Entrepreneurship and Impact Investing.

In teaching entrepreneurship at several academic levels (Executive, Graduate, Undergraduate and PhD), Rachida brings the results of her research to the classroom. In particular, she tries to prompt students to think more expansively about their role as entrepreneurs and as managers, and to develop an awareness of the power of entrepreneurship to create sustainable and social value. Formerly the Academic Director for the BBVA Momentum Social Enterprise Accelerator at Headspring, she also serves as Program Chair for AOM's Entrepreneurship Division.

Rachida's research focuses on social and women entrepreneurship. Her work has been published in leading international journals such as the Journal of Business Ethics and Entrepreneurship Theory and Practice and she is the Associate Editor of Journal of Business Venturing Insights (JBVI). She has also received several awards such as the USASBE Social Entrepreneurship SIG Award for Excellence in Scholarship, the "Best Women's Entrepreneurship Paper Award" from the Entrepreneurship division of the Academy of Management, and the "Outstanding Award for Best Doctoral Dissertation" from the Universidad Autónoma de Madrid. She has also been engaged in action research and consulting work, one that is directly relevant for public policy. She served as a member of GECES, an Expert Group of the European Commission on Social Entrepreneurship (2012-2015) and has produced several policy reports for the OECD and the Spanish ministry of diversity and equal opportunities.

For more information: https://sites.google.com/view/rachidajusto/home

rachida.justo@ie.edu

PREREQUISITES

SUBJECT DESCRIPTION

Social Entrepreneurship is an emerging and rapidly changing business field that examines the practice of identifying, starting and growing successful mission-driven for profit and nonprofit ventures, organizations that strive to advance social change through innovative solutions.

The Social Entrepreneurship elective aims to assist would-be social entrepreneurs in developing innovative, sustainable and scalable organizations that deliver measurable social value. Students interested in **working for social enterprises**, for **social business accelerators**, social innovation centres, **CSR departments** of for-profit corporations, **impact funds**, i**nnovative non-profits** or **governements** can also follow this course. The overall purpose of the course is to enable students to consider social value creation as a career compass and/or gain a valuable expertise to work in the growing social innovation/impact investing ecosystem.

The course is designed to prompt students to be critical, pragmatic, and inspired thinkers about key issues involving social entrepreneurship, socially driven business decisions, and the complexities of financing social change. To do so, we will look at the field of social innovation as a mindset and as a practice.

- **Social entrepreneurship as a mindset:**

To foster this mindset, we will incorporate principles of ethics, social innovation and human centered design thinking as a set of methods to cultivate our empathy and deep understanding of social problems. In order fully understand the genesis and evolution of social entrepreneurship and impact investing, we will also need to study the historical and ideological origins of the phenomenon, and related areas of corporate social responsibility, socially responsible investing, social finance, strategic/venture philanthropy, sustainable development, including microfinance and the government's role in creating systems that support social and economic development. Moreover, recent advancements in the field of innovation for social change is reviewed, with a focus on base of the pyramid strategies, scaling opportunities, and cross-sector alliances.

- **Social entrepreneurship as a practice:**

The course will not only provide practical tools about how to start, grow and invest in a social enterprise. It will also train students to evaluate projects for social entrepreneurial organizations, including for-profit social businesses and innovative non-profits. It will address social planning along the stages of entrepreneurial discovery, social impact measurement, and innovative investment. While not a technical course, students will be exposed to basic skills and strategies for impact investing such as the ability to source, screen and structure socially driven investment deals. Most importantly, students develop a critically refined view of the concept of "impact", how to measure it, and how to choose the right organizational form and financing vehicle for the targeted problem ensuring it is appropriate to the local context.

LEARNING OBJECTIVES

At the end of the course, students can expect to:

- Have gained an understanding of the field of social entrepreneurship
- Perform in-depth analysis of the opportunities, challenges, and tensions facing social entrepreneurs

- Understand how they are using business skills and the principles inherent in building a sustainable business to address complex social and environmental problems.
- Master the tools used to define and measure social impact and return, and practice applying them to different kinds of social ventures;
- Work personally on a final class Project addressing a social/environmental issue to apply lessons learnt in class.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	14.0 %	21.0 hours
Discussions	22.67 %	34.0 hours
Exercises in class, Asynchronous sessions, Field Work	18.0 %	27.0 hours
Group work	28.0 %	42.0 hours
Individual studying	17.33 %	26.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Harnessing the Power of entrepreneurship for a Sustainable Future

Starting from presenting current approaches to and definitions of social entrepreneurship, the first session aims at creating a common language among students. The history and future of relationships between social and business is discussed, together with a focus on the changing dynamics in the business, government and non-profit sector.

Article: "For Social Entrepreneurs What Comes First: Business or Mission?" (Entrepreneur

Magazine, Oct. 30, 2013) (Optional)

Article: "Find Your Mission: Generation Flux's Secret Weapon" (Fast Company Magazine, November

2014)

Multimedia Material: Video: "Casey Gerald: The gospel of doubt | TED Talk" (TED.com)

Come prepared to discuss: your definition of social entrepreneurship, an example of social entrepreneurship you find compelling and to what extent social entrepreneurshipinnovation might fit within your personal and professional goals

SESSION 3 (LIVE IN-PERSON)

IMPACT-CENTRED DESIGN: LESSONS FROM A HIGH-PROFILE SOCIAL ENTREPRISE

Design thinking has become a buzzword in the field of management, and social entrepreneurship is no exception. But how does design thinking really looks like on the ground, especially when the entrepreneur seeks to solve complex and entrenched social problems, often in adverse contexts? During this session will discuss these issues through the analysis of a high-profile social enterprise.

Required:

Watch the Video: The Empathic Civilization or read the article.

Multimedia Material: Video: The Empathic Civilization (Youtube)

Article: Mark Honigsbaum: Barack Obama and the 'empathy deficit' (The Guardian, Fri 4 Jan 2013)

SESSIONS 4 - 5 (LIVE IN-PERSON)

Theory of Change

Social innovation is about doing things differently - disrupting the status quo – creating change to make things better. Articulating the "how " i.e the strategy through which the organisation aims to create change is a simplified way to define the theory. The Theory of Change (ToC) exercise is one of the building blocks that we will adopt again in later sessions (Session 11) on Impact Measurement.

Multimedia Material: Video: Making Smart Cities Socially Inclusive (TED.com)

Assignment. Prior to the Session, students will choose one social impact organisation of his/her choice. This could be from your home country, where you are living or something you are intrigued about. For other needed inspiration, some links in the resources section. Each student will come prepared to class with the following

    a) Mission statement of the chosen organisation

    b) How the chosen organisation plans to disrupt the status-quo i.e do things differently & make things better

    c) A first attempt to make explicit the Theory of Change of the chosen organisation.

SESSIONS 6 - 7 (LIVE IN-PERSON)

INTRO TO SOCIAL BUSINESS MODELS

In this double-session we will dive deeper into venture design and gain an understanding of adapt the Business Model Canvas for social impact. Through this illustrative example of a Spanish social enterprise helping the Albino population in Tanzania, this session will provide the opportunity to apply tools for business model innovation and business model change to the realm of social value creation. It will help students evaluate the diversity of business models available and pros and cons of each option. It will also allow to analyze how the focus of the business model at a particular enterprise shifts over time. Using different case examples, we will also discuss elements of the business model that allow organizations to scale their impact, including hybrid business models.

Questions for case discussion in class (individual)

    1. What is the social innovation achieved by Mafalda Soto?

    2. What are the key elements of the current business model?

The second session format would be a group working session for exploring and designing the business models for different stages of the business and a pitch to class.

Article: KiliSun: Protecting Beyond the Sun (EMERALD EMERGING MARKETS CASE STUDIES,

VOL. 6 NO. 3 2016, pp. 1-20) (CED)

Multimedia Material: Video: Albinism Awareness Campaign (Youtube)

SESSIONS 8 - 9 (LIVE IN-PERSON)

WORKSHOP

Details will be provided in class

SESSIONS 10 - 11 (LIVE IN-PERSON)

FINANCIAL SUSTAINABILITY

REACHING FINANCIAL SUSTAINABILITY THROUGH EARNED INCOME STRATEGIES

Recent trends in the social sector point towards earned income strategies as an effective way to diversify revenue sources, to create steady streams of unrestricted funding and hence to build a sustainable organization. While this strategy offers several benefits it also encloses some challenges that, if not addressed properly, can lead to mission drift. This session will aim to uncover some of the advantages and challenges to which most social entrepreneurs pursuing an earned income strategy are confronted, and hints to some ways of addressing them

Preparation for class:

1. **Watch a short video** on the app Yuka

As you'll quickly understand, Yuka is an app that gives you a score on products that have been processed based on their nutritional value (food), the presence or not of dangerous additives (food/cosmetics), and the organic nature of the product (food).

2. **Download the app** and try it on at least 3 products (both foods & cosmetics/care which are products like shampoo, toothpaste, face cream, etc.) next time you go grocery shopping.

3. **Report your impressions & comments** in the Miro frames created for this purpose

Multimedia Material: Video: Introduction to the Yuka app (Youtube)

Multimedia Documentation: Yuka

SESSIONS 12 - 13 (LIVE IN-PERSON)

SCALING: HOW TO REPLICATE SOCIAL PROGRAMS?

Through the analysis of this popular Spanish social organization, the session analyses the process that social entrepreneurs go through in order to increase positive social impact.

Practical Case : Solidarity Entrepeneurship and Employment Launchers. Case (A) Peridis and the birth of the LEES (ENT010061-A-ENG-WOD)

Article: Bradach, Jeffrey (2003). "Going to scale: the challenge of replicating social programs", (Stanford Social Innovation Review, Spring, pp.19-25) (Optional)

*Practical Case : Solidarity Entrepeneurship and Employment Launchers. Case (B) Alvaro and The Challenges Faced by LEES in 2015. (ENT010062-B-ENG-WOD) *Publish during Class*

Questions for case preparation:

1. What is the social problem Peridis is trying to address?
2. What is special about LEES approach and organization?
3. How did LEES management finance and scale up their activities

SESSION 14 (LIVE IN-PERSON)

COACHING SESSION #1: FINAL PROJECT COACHING WITH STUDENTS

This is our first coaching session where the professor will help students erflect about their final project, choose the prims and frameworks they should levelrage form class to analyze their chosen social entreprrise and solve any doubts they might have regarding the expectations for the final project.

After a general Q & A in class, teams will have the benefit of 1-1 coaching of 10 minutes each with the Professor.

SESSIONS 15 - 16 (LIVE IN-PERSON)

CIRCULAR ECONOMY WORKSHOP

This workshop will be taught by adjunct professor Dr. Hana Milanov

Further details will be provided in class

SESSION 17 (LIVE IN-PERSON)

IN-CLASS EXAM

Please preprare for this exam by revising all the material seen in class until session 14 (included)

Further details will be provided in class

SESSIONS 18 - 19 (LIVE IN-PERSON)

IMPACT INVESTING BOOTCAMP (Part I)

This session will introduce students to the area of impact investing. It will shed light on what does impact investing mean, what the impact investing ecosystem looks like and what considerations should impact fund managers take when starting up their funds. After a short lecture, the students will be engaged in an impact fund simulation, where through a series of exercises in this and the following session, they will design their own investment thesis and search for social enterprises they would want to invest.

This workshop will be taught by adjunct professor Pola Nachyla

Article: Making Sense of the Many Kinds of Impact Investing (HBS H02MOB-PDF-ENG)

Multimedia Material: Video: Startup Funding Explained: Everything You Need to Know (Youtube)

SESSIONS 20 - 21 (LIVE IN-PERSON)

IMPACT INVESTING BOOTCAMP (Part II)

In the second part of the impact investing bootcamp, the students will continue exploring the operations and challenges of impact funds. After sourcing the startups, they would invest as impact fund managers, they will explore different strategies of helping their portfolio companies succeed both financially and in terms of impact. The last session of the bootcamp will look at two more crucial topics for impact funds: impact reporting and ESG. The goal of this session will be to deliver practical tools for impact and ESG evaluation for students, through both theory and exercises to show them in practice. The boot camp will be then wrapped up and concluded.

This workshop will be taught by adjunct professor Pola Nachyla

Own Material: RAISE's Impact Report

Multimedia Material: Video: What is Double Materiality in ESG? (Youtube)

SESSIONS 22 - 23 (LIVE IN-PERSON)

IMPACT MEASUREMENT

This session also examines the practice of social entrepreneurship and the tensions and challenges faced by social entrepreneurs in achieving long-term, sustainable change and measurable impact.

Practical Case: Mobile School. Bringing out the wisdom of the Street (Vlerick Business School)

(TCC 812-037-1 (to be published))

Questions for class preparation

Do you think Arnoud is an entrepreneur? And a social entrepreneur?
What were some of the most important challenges in developing his organization? How would you address them?

SESSION 24 (LIVE IN-PERSON)

COACHING SESSION #2

Student teams have the benefit of 1-1 coaching of 20 minutes each with the Professor. teams will sign on Doodle link that will be shared, indicating the area they would like to focus for the coaching session

SESSIONS 25 - 26 (LIVE IN-PERSON)

UNDERSTANDING THE PROMISES AND LIMITS OF SOCIAL IMPACT BONDS

Video to be watched and discussed in class

SESSION 27 (LIVE IN-PERSON)

SELLING IN OR SELLING OUT?

Tis session, organized in the format of a worskhop, will descuss differnt ways for extending impact beyond social entreprises

Further details will be provided in class

SESSION 28 (LIVE IN-PERSON)

KEYNOTE SPEAKER FORM THE SOCIAL ENTREPRENEURSHIP ECOSYSTEM

SESSIONS 29 - 30 (LIVE IN-PERSON)

ORAL PRESENTATION OF SOCIAL ENTREPRENEURSHIP PROJECTS

EVALUATION CRITERIA

A. CLASS PARTICIPATION

Three main criteria will be used in reaching judgment about your class participation:

1. Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.
2. Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.
3. Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk

does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

4. <u>Non-participation:</u> please note that you won't receive a mark just for being present in class. being present but fainling to pay attention to the course and/or not contributing with comments, insights and /or questions will result in a zero.

B. INDIVIDUAL IN-CLASS EXAM

Refer to Session 17. The reference template and workbook/reading will be discussed & shared in class. Students will work on an individual exam during class.

C. DOCUMENT FOR COACHING SESSION (GROUP WORK)

More details will be provided in class about this final individual exercise.

D. FINAL REPORT (GROUP WORK)

As part of the final deliverable and exam, students will have to prepare and present in groups of around 5-6 students a "FINAL REPORT", also called "the Social Enterprise Project". This project is a group exercise and is highly is centered on experiential learning, where students will have the possibility to choose among the two options: Consult and Advocate

a) <u>Consult:</u> Working a "consulting report" for a social entrepreneur: Students will be provided with the unique opportunity to design and engage in a "pro bono consulting project" for a real social organization. Early in the course, students will have the opportunity to choose from a selection of social enterprises or propose one of their choices. Once students have expressed their preferences for client projects, and depending on availability and fit, each team (around 4 students) is assigned to one of the selected projects. Starting from then teams will collaborate (remotely if the social enterprise is outside Madrid -via e-mail, telephone, and/or online conferencing) with their "clients" to shape a viable consulting project addressing a specific area of organizational need. Teams are expected to undertake careful preparation so as to ensure a productive exchange with the social entrepreneurs (e.g., identifying necessary stakeholder interviews, developing preliminary questionnaire that will serve as a basis for the interview, identifying information to be requested to the client for research, etc.).

b) <u>Advocate:</u> Students can also decide to write a business case on a real social enterprise, acting as a "professor of the day" and advocating for social entrepreneurship among their peers. From our perspective, a "good" business case is one that could be used in IE University for teaching a social entrepreneurship course, included in a social entrepreneurship textbook and/or published in an academic case journal. Specific guidelines will be provided by the professor, but in a nutshell, writing a case requires careful problem framing, perceptive application of concepts and frameworks discussed in class and clear logical writing. Authors of best cases might be able to turn this project into a line in their CV by publishing a revised and extended version of it with the professor (more details will be provided in class).

Classes will provide students with the topical knowledge and practical skills needed to best serve their clients or develop their own projects/cases. As each project/consulting engagement will have unique requirements, students are expected to be self-directed, supplementing classroom learning with the appropriate level of research that is required for their specific projects. The professor will however organize coaching and advisory sessions with each team in which students will receive guidance into the process of crafting the report. The meeting will also to ensure the quality and on time completion of the final client deliverables and help students solve possible doubts or issues. The professor will also provide additional readings and information related to specific issues or topics analyzed by each team when necessary. The objective is that students end up having a well-rounded knowledge of the issues faced by social entrepreneurs.

The final reports (either case or pro-bono consulting) should not be longer than 10 pages including exhibits (content details to be given in class).

E. ORAL PRESENTATION (GROUP WORK)

criteria	percentage	Learning Objectives	Comments
Oral presentation	10 %		
In-class exam	20 %		
Document for coaching session	5 %		
Social Enterprise Final report	35 %		
Class Participation	30 %		

RE-SIT / RE-TAKE POLICY
RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

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- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

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- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the

Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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SPORT BUSINESS INTELLIGENCE TOOLS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 SBIT-NBA.1C.n.OPT.M.A

Area Accounting and Management Control

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JORGE MARTINEZ BERNAL**

E-mail: jmartinezb@faculty.ie.edu

Sport Advisor | UEFA Club competitions | Event Management | Global Sport Industry | Founder of GSport.MX

Jorge Martinez Bernal is a:

- Sport event expert
- 11 years - UEFA Events -City Operations & Clubs competition specialist
- Sponsor activations, CSR programmes & Volunteer programme responsible
- Lecturer at European Sport Business School - Valencia FC
- GSport México founder
- Football fan
- L-2 Padel coach
        Monday to Friday - afternoons

PREREQUISITES

N/A

SUBJECT DESCRIPTION

The sports industry is constantly evolution, from traditional sports to the trend sports, this evolution is being led by technology that manages to engage new fans/consumers and build up loyalty in between. Thus, companies are attracted by the experiences that fans/costumer are willing lived.

This course aims to analyze the sports industry and especially research this continuous innovation in regards of fans/costumer demands, we establish in consideration from how the fans "watch" their favorite sport to "live" the unforgettable experiences.

Moreover, companies and organizations are willing to take advantage of these demands in order to merge and consolidate new markets. Companies are dedicating time and money in order to invest their budgets through sports-entertainment building new relationships with the fans/costumers using the sport events as a strategic tool. #sportainment

A professional and effective analysis of the needs and demands of the fans, in accordance withdifferent variables of innovation, will allow us to create events and experiences at the height of the expectations of our final consumers, with the clear objective of maximizing profitabilityfor our business

We are ready to deliver a professional and efficient analysis, according with the fans/costumer demands and needs, in order to fill up their expectations. These professional inputs will support us to design and build up events and experiences, "out of the charts" for the fans/costumer, looking at the max profitability for our business.

LEARNING OBJECTIVES

- ⁃ To understand and analyze fan profiles and needs
- ⁃ To analyze decision elements
- ⁃ To design the managing areas of the venues and sport events
- ⁃ To design a strategic plan of the venues and sport events.
- ⁃ ROI

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10.0 hours
Discussions	10.0 %	7.5 hours
Exercises in class, Asynchronous sessions, Field Work	26.67 %	20.0 hours
Group work	26.67 %	20.0 hours
Individual studying	23.33 %	17.5 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

G1 - To understand and analyze fan profiles and needs
- Back to 90s

SESSION 2 (LIVE IN-PERSON)

G1 - To understand and analyze fan profiles and needs
- Globalization - new generations - new fans

SESSION 3 (LIVE IN-PERSON)

G2 - To analyze decision elements
- The power of the brands - evolution

SESSION 4 (LIVE IN-PERSON)

G2 - To analyze decision elements
- "Way of living"

SESSION 5 (LIVE IN-PERSON)

G3 - To design the managing areas of the venues and sport events
- #sportainment

SESSION 6 (LIVE IN-PERSON)

G3 - To design the managing areas of the venues and sport events
- VIP - Hospitality vs VIP - Experiences

SESSION 7 (LIVE IN-PERSON)

G3 - To design the managing areas of the venues and sport events
- Brands vs brands (Rivarly - Coexist)

SESSION 8 (LIVE IN-PERSON)

G3 - To design the managing areas of the venues and sport events
- Ambushing

SESSION 9 (LIVE IN-PERSON)

G4 - To design a strategic plan of the venues and sport events.
- Workforce (Key players)

SESSION 10 (LIVE IN-PERSON)

G4 - To design a strategic plan of the venues and sport events.
- LOC (Local organization)

SESSION 11 (LIVE IN-PERSON)

G4 - To design a strategic plan of the venues and sport events.

- Timeline & Masterplan

SESSION 12 (LIVE IN-PERSON)

G4 - To design a strategic plan of the venues and sport events.

- Production

SESSION 13 (LIVE IN-PERSON)

G5 - ROI

- Debrief & Learing

SESSION 14 (LIVE IN-PERSON)

G5 - ROI

- Legacy

SESSION 15 (LIVE IN-PERSON)

G5 - ROI

- Conclusions

EVALUATION CRITERIA

40 % - Final exam
30 % - Team workshop
30 % - Class collaboration

criteria	percentage	Learning Objectives	Comments
Final Exam	10 %		Final Business case document
Final Exam	30 %		Final Business case presentation
Intermediate Tests	20 %		Group workshop in class
Individual Presentation	10 %		Online debates and homeworks
Class Participation	30 %		Attendance and participation

RE-SIT / RE-TAKE POLICY
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ADDITIONAL MATERIALS
- Based on UEFA Clubs competitions - UCLF & UELF - Business cases
- MKT research

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

N/A

ATTENDANCE POLICY

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N/A

ETHICAL POLICY

Please, check the University's Ethics Code here. The Program Director may provide further indications.

N/A

STARTUP ECOSYSTEMS : CREATING VALUE IN EMERGIING MARKETS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 SEC-NBA.1C.e.OPT.M.A

Area Others

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **JULIO DE CASTRO**

E-mail: JCastro@faculty.ie.edu

Professor and Chair, Dept. of Entrepreneurship

Julio Orlando De Castro's infectious enthusiasm and wry sense of humour makes it easy to become interested in what he has to say about strategy and entrepreneurship. And as someone who comes from the Dominican Republic and who has consulted for companies both in the US and elsewhere, he has plenty of stories to tell when it comes one of his main areas of study - the way cultural variances have an impact on entrepreneurship in different parts of the world.

Prof De Castro is fascinated by how the American entrepreneurship spirit is migrating across the Atlantic to Europe, which has traditionally lagged behind the US on this front. Another of his areas of focus is the nature of entrepreneurship among women and Hispanics. "I look at questions of context and conditions and what implications they have for public policy," he says. "What's interesting is that the way people interpret cues in the environment may play a role in their decision to become an entrepreneur. So what you have to do to foster entrepreneurship in the US may be very different from what you do in the UK or in Spain."

The process of privatisation is another area of interest for Prof De Castro, particularly in former communist states and less developed countries. He is also keenly following the nature of technology transfer and its effects on new venture creation - especially with respect to piracy.

Prof De Castro - whose work has appeared in numerous top level academic publications such as his work the Academy of Management, Journal of International Business, the Journal of Business Venturing, and the Journal of Management Studies, and books and other media - believes that companies need to recognise conditions where it can play a positive role in creating a market and building a brand. "What's interesting is you're starting to see some evidence of companies taking a more strategic approach to this," he says.

Academic Background

- PhD in Business Administration, University of South Carolina, USA
- Degree in Industrial Engineering, Universidad Católica Madre y Maestra, Dominican Republic

Academic Experience

- Professor of Entrepreneurship and Strategy, IE Business School 2003 to present
- Associate Dean of Research, IE Business School, 2003 to 2008
- Chair, Strategy Department, 2006 to 2008
- Chair, Entrepreneurship Department, 2011 -
- The Lewis Family distinguished professor of Entrepreneurship, Babson College. 2008-2011
- Member of the Board of Governors, Academy of Management, 2003 to 2006
- President, Iberoamerican Academy of Management 2008-
- Associate Professor of Strategy and Organisation Management, University of Colorado at Boulder, USA, 1997 to 2003
- Assistant Professor of Strategy and Organisation Management, University of Colorado at Boulder, USA, 1989 to 1997
- Visiting Professor, Instituto de Empresa, 2001
- Visiting Professor, Universidad Carlos III de Madrid, 1999
- Visiting Professor, Universidad Católica Madre y Maestra, Dominican Republic, 1993, 1995
  julio.castro@ie.edu

PREREQUISITES

SUBJECT DESCRIPTION

This course focuses on approaches and opportunities for starting and growing entrepreneurial businesses in Latin America. We will study characteristics influencing entrepreneurship in a diversity of countries, ranging from Brazil to Chile to Peru. We will examine countries utilizing a unique framework, and draw some conclusions about the similarities and differences across categories and countries. We will then do a feasibility study of a venture opportunity for a Latin American market. Upon completing this course, you will have a better understanding about the unique elements associated with starting a new venture in a Latin American country market. Latin America is widely assumed to present limitless entrepreneurial opportunities, but the viability and nature of these opportunities are not all the same across the various countries that make up Latin America. While many aspects of entrepreneurship can be generalized across ventures started anywhere in the world, we cannot assume the same opportunities can be approached similarly in different Latin America contexts.

This course provides an overview of the mindsets, methods, and managerial activities necessary to understand the entrepreneurial process in Latin America, in particular the process of detecting and understanding entrepreneurial opportunities in Latin American countries. This is not a culture class. Our role is not to delve into the culture of these countries, rather it is to understand the drivers of entrepreneurial opportunities in those countries and how we can better utilize them to create sustainable business ventures. The main objective of this course is to expose you to the many dimensions of new venture creation in the context of Latin America and to give the tools needed to launch a new venture.

Even though traditionally people have discussed Latin America as a block, what makes a course like this interesting and unique is the diversity within and across the countries, and what it means for entrepreneurial opportunities. One of our first aspects of this class will be to develop and discuss a framework to assess and understand the presence of opportunities in these markets, including income (gdp) size of the middle class, presence and size of informal markets, and its implications for entrepreneurial opportunities, and within country and across country differences in the different segments. One of the key insights of this class is that entrepreneurial opportunities are varied and exist in different segments and countries of Latin America, and we provide evidence that some of the most creative new ventures in the world (Kola real, Lummi, La Martina) have emerged from an understanding of those drivers.

We base that framework on a combination of sources and so the materials for this class will come from a variety of places. Moreover, not one book captures the phenomena we are trying to convey, so we will rely on multiple sources. From traditional entrepreneurship theory and research, from international business theory, and from new thinkers such as Hernando de Soto, CK Prahalad and Amartya Sen, plus a number of groundbreaking materials, such as the Global Entrepreneurship Monitor (GEM), the most comprehensive and up-to-date study of entrepreneurial activity around the world, co-sponsored by Babson College. I have selected relevant and contemporary books, readings, and cases illustrating numerous dimensions around starting a business in Latin America. Thus we will not have one textbook for the class, but a variety of readings, lectures, books, notes and cases, which will be supplemented by materials that all of us are tasked to find and to bring to the class and to the discussion.

LEARNING OBJECTIVES

This class is not your traditional lecture. It is seminar for Juniors and Seniors and will be treated as such. It involves a significant amount of work, but I believe that it will be extremely rewarding and enriching. Each student will take responsibility for his/her learning, and for contributing to the knowledge developed by the class. My role is to guide and assess your learning I also welcome your comments and directions throughout the class and we will change and adjust accordingly. Again, my main objective is for this class to be a conversation about the nature of entrepreneurial opportunities in Latin America.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Participation and case discussion		20%
ENT Opportunity write ups (Individual)	(2 at 5% ea.)	10%
Class country framework analysis (group)		15%
Feasibility plan document (group)		20%
Feasibility plan presentation (group)		10%
Exam		25%

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	40.0 %	30.0 hours
Discussions	13.33 %	10.0 hours
Exercises in class, Asynchronous sessions, Field Work	13.33 %	10.0 hours
Group work	13.33 %	10.0 hours
Individual studying	20.0 %	15.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Class introduction and syllabus
A framework for understanding entrepreneurial opportunities in Latin America

SESSION 2 (LIVE IN-PERSON)

A framework for understanding entrepreneurial opportunities in Latin America Institution, markets, informal markets and property rights in Latin America (II)

SESSION 3 (LIVE IN-PERSON)

Informality in emerging markets

Book Chapters: De Soto, "The Other Path" Chapters 1, 5 and 8 (See Bibliography)

SESSION 4 (LIVE IN-PERSON)

The bottom of the Pyramid can be a source of entrepreneurial opportunities

Book Chapters: Prahalad, "The Fortune at the Bottom of the Pyramid: Eradicating poverty through profits" Chapters 1, 2 and 3 (See Bibliography)

SESSION 5 (LIVE IN-PERSON)

Applying the framework: searching and understanding entrepreneurial opportunities: the case of Chile

Applying the framework: searching and understanding entrepreneurial opportunities: the case of Argentina. Can Latin American ventures compete at the top of the market globally
Country analysis: Argentina

Practical Case: Geomar (Will be Provided by Professor)

SESSION 6 (LIVE IN-PERSON)

Applying the framework: searching and understanding entrepreneurial opportunities: the case of Argentina. Can Latin American ventures compete at the top of the market globally
Country analysis: Argentina

Practical Case: La Martina (A): "Pasion Argentina" (HBS IMD374-PDF-ENG)

Practical Case: La Martina (B): Selling the Passion? (HBS IMD376-PDF-ENG)

SESSION 7 (LIVE IN-PERSON)

Applying the framework: searching and understanding entrepreneurial opportunities: the case of Peru.

New venture and internationalization at the bottom of the pyramid

Country analysis: Peru

Case: Kola Real

Kola Real's Low-Cost

International Expansion Strategy

Other readings:

- ⁃ In Mexico, Big Cola is the real thing
- ⁃ Kola Real Takes on Coca-Cola
  Entrepreneurial opportunity write up #1 due

Article: Kola real's low-cost international expansion strategy (2008, Wiley Periodicals) (CED)

SESSION 8 (LIVE IN-PERSON)

Growth and political climate. The case of Guatemala

country analysis. Guatemala

Last date to chose Feasibility plan topic

Practical Case: GuateSalud (HBS 395125-PDF-ENG)

SESSION 9 (LIVE IN-PERSON)

Applying the framework: searching and understanding entrepreneurial opportunities: the case of brazil

Country analysis: Brazil

Practical Case: DentalCorp (HBS 806023-PDF-ENG)

SESSION 10 (LIVE IN-PERSON)

Development as freedom: what does it mean for entrepreneurial opportunities

Sen: Development As Freedom,

Entrepreneurial opportunity write up #2 due

Intro and chapters 1 and 5

SESSION 11 (LIVE IN-PERSON)

Applying the framework: searching and understanding entrepreneurial opportunities: the case of Venezuela
Entrepreneurship in Venezuela

Practical Case: Powerven: When It Is Imperative to Change (HBS IE0003-PDF-ENG)

SESSION 12 (LIVE IN-PERSON)

Applying the framework: searching and understanding entrepreneurial opportunities: the case of Mexico
Entrepreneurship in Mexico

Country analysis: Mexico

Practical Case: Empemex (HBS 807031-PDF-ENG)

SESSION 13 (LIVE IN-PERSON)

Social entrepreneurship opportunities: can they be for profit?

Practical Case: Felipe Vergara and Lumni: Launching an Innovation in a Developing Economy (HBS UV0491-PDF-ENG)

SESSION 14 (LIVE IN-PERSON)

Applying the framework: searching and understanding entrepreneurial opportunities: the case of Colombia
Entrepreneurship in Colombia

Country analysis: Colombia

Practical Case: Andres Galindo (HBS BAB124-PDF-ENG)

SESSION 15 (LIVE IN-PERSON)

Feasibility plans presentations
Exam (TAKE HOME)

EVALUATION CRITERIA

Although this course provides a number of opportunities to learn about the entrepreneurial process, class discussion and activities are the primary ways for students to learn. More importantly, learning in this course is not limited to simply acquiring facts and knowledge, but extends into actively applying them, as you will do in developing your feasibility plan. Your accomplishments during the course will be evaluated as follows:

Participation and case discussion	20%
ENT Opportunity write ups (Individual) (2 at 5% ea.)	10%
Class country framework analysis (group)	15%
Feasibility plan document (group)	20%
Feasibility plan presentation (group)	10%
Exam	25%
TOTAL	100%

criteria	percentage	Learning Objectives	Comments
Final Exam	25 %		
Individual Work	10 %		ENT Opportunity write ups (Individual) (2 at 5% ea.)

Workgroups	20 %		Feasibility plan document (group)
Other	15 %		Class country framework analysis (group)
Group Presentation	10 %		Feasibility plan presentation (group)
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY

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- Students failing the course in the ordinary call (during the semester) will have to *re-sit* evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

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- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable"in the extraordinary call.

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- Students **failing more than 18 ECTS credits** after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the

June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

- De Soto, Hernando. (1989). *The Other Path.* 1rs. Basic Books. ISBN 9780060160203 (Printed)
- Prahalad, CK. (2006). *The Fortune at the Bottom of the Pyramid: Eradicating poverty through profits.* Pearson. ISBN 9780131467507 (Printed)
- Sen, Amartya. (2020). *Development as freedom.* Anchor books. ISBN 9780385720274 (Digital)

BEHAVIOR RULES

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STRATEGIC MANAGEMENT OF INNOVATION

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 SMOI-NBA.1C.s.OPT.M.A

Area Others

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MARTINA PASQUINI**

E-mail: mpasquini@faculty.ie.edu

Martina Pasquini holds a PhD in B&A and Management from Bocconi University. She is currently Professor of Strategy at IE University since September 2014. Her research interests are at the intersection of strategy, innovation management and entrepreneurship with a particular attention on the role of demand, users, and communities of values. She has always been fascinated and attracted by companies that engage with different communities and have a social impact. Over the years, she has been granted prestigious research funds by the EU through the Marie-Curie Program, the Spanish Ministry of Science and Innovation, and FUNCAS institution for her research in strategies of shared value creation. Her current research deals with identity-based strategies, pro-social investments and initiatives, social and sustainable IPRs and their effect on differentiation advantage and companies' performance. She is also involved in research in businesses with purpose, particularly B-Corporations. She currently teaches Strategic Management, Innovation Management & Technology Strategy and Research Methods at undergraduate level. She has also taught Entrepreneurship & Innovation, Global Entrepreneurship, Techniques for Innovation Management at Master level in leading European Universities. She regularly attends international conferences such as AoM, SMS, and DRUID and her works have been published in international journals such as Strategic Management Journal, Research Policy, and Journal of Business Venturing. She has been appointed as Representative at large in the Corporate Strategy Division of the Strategic Management Society (2018-2020) and currently she has been elected Global Rep for Europe in the STR division at the AoM, she sits in the executive board of The Case Centre and in the board of the B-Academics, where she chairs the events committee.

mpasquini@faculty.ie.edu

Office is at IE Tower: Floor 22 - Room 22

PREREQUISITES

There are no mandatory prerequisites, but some extent of knowledge in competitive strategy is requested

SUBJECT DESCRIPTION

Innovation accelerates economic growth and provides advances in crucial human endeavors such as medicine, agriculture, and education, among others. For industrial organizations, the primary engines of innovation in the Western world, innovation provides both exceptional opportunities and

steep challenges. While innovation is a powerful means of competitive differentiation, it is also a competitive race that must be run with speed, skills, and precision. It is not enough for a firm to be innovative—to be successful, it must innovate better than its competitors. Many insights on innovation are about how it affects the competitive dynamics of markets, how firms can strategically manage innovation, and how firms can implement their innovation strategies to maximize their likelihood of success. In this course, the subject of innovation management is approached as a

strategic process. The course covers, on one hand, the foundations and implications of the dynamics of innovation, helping managers and future leaders to better interpret their technological environments and identify meaningful trends. On the other hand, it addresses the firm's strategic direction and formulation of its innovation strategy, including project selection, collaboration strategies, and strategies for protecting the firm's property rights.

LEARNING OBJECTIVES

The purpose of this course is to develop participants' ability to think strategically about their technology / technological assets and to provide knowledge to understand how companies can elaborate effective appropriability and commercialization technology strategies.

The course will make use of interactive teaching methods, aimed at transferring highly specialized knowledge related to the individual topics, and to develop attitudes and abilities to listening, strategic thinking, group-working, participation and leadership.

The course is designed to address different topics such as:

- learn how a firm appropriates value throughout its technology;
- learn how a firm creates value throughout its technology;
- learn different models of innovation (closed vs open);
- learn how to implement effective technology strategies by recognizing valuable projects, organizing teams, and product development;
- learn technical aspects of patents and trademarks and their value and how they can add value to the firm.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

The methodology is based on lectures, discussions, group work, and individual studying.

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	30.0 %	45.0 hours
Discussions	23.33 %	35.0 hours
Exercises in class, Asynchronous sessions, Field Work	16.67 %	25.0 hours
Group work	13.33 %	20.0 hours
Individual studying	16.67 %	25.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to technology strategy and innovation management

Book Chapters: Schilling, M. A. Strategic Management of Technology Innovation. Mc Graw Hill, New York, 5th Edition; Chapter 1 (See Bibliography)

SESSION 2 (LIVE IN-PERSON)

Evolution of Technological Innovation and The Nature and Evolution of Technology Markets

Book Chapters: Schilling, M. A. Strategic Management of Technology Innovation. McGraw Hill, New York, 5th Edition; Chapter 3 (See Bibliography)

Book Chapters: Rothaermel, Frank T. Chapter 7 "Crossing the Chasm", pp.235-242, in Strategic Management (See Bibliography)

Article: When early adopters don't adopt (Science, 2017, vol. 357, no 6347, p. 135-136) (CED)

Article: Smaller: The Disposable Diaper and the Meaning of Progress (The New Yorker, November 16, 2001)

Book Chapters: Foster, Richard. "The S Curve: A New Forecasting Tool." Chapter 4 in Innovation: The Attacker's Advantage. New York, NY: Summit Books, 1986 (See Bibliography)

SESSION 3 (LIVE IN-PERSON)

Standard Battle and Design Dominance

Book Chapters: Schilling, M. A. Strategic Management of Technology Innovation. Mc Graw Hill, New York, 5th Edition; Chapter 4 (See Bibliography)

SESSION 4 (ASYNCHRONOUS)

Sustainability Topics:
- Social Challenge
- Economic Development

What's the Big Idea?

Practical Case: What's the Big Idea? (HBS 602105-PDF-ENG)

1. How proprietary or defensible is BIG's system? Could one of the major toy companies replicate it? Why or why not?
2. Why does BIG seem better able to identify and bring to market innovative toy concepts, whereas the major toy companies feel they are in a period of a "lack of innovation" (p.3)?
3. Can BIG replicate its system in other industries?

SESSION 5 (LIVE IN-PERSON)

Innovation as Process

Article: Breakthroughs and the Long Tail of Innovation (HBS SMR265-PDF-ENG) (pgs. 69-74)

SESSION 6 (LIVE IN-PERSON)

Disruptive Innovation: Competition and Technological Innovation

Book Chapters: Christensen, Clayton. The Innovator's Dilemma: HBS Press, 2011. Chapter 3 (See Bibliography)
Article: What is Disruptive Innovation? (HBS R1512B-PDF-ENG) (p. 44-53)
Article: The Other Disruption (HBS R1603G-PDF-ENG) (pp. 78-84)
Article: Keep Calm and Manager Disruption (HBS SMR550-PDF-ENG)

SESSION 7 (LIVE IN-PERSON)

Sustainability Topics:
- Social Challenge

The Case of Netflix

Practical Case: Netflix in 2011 (HBS 615007-PDF-ENG)

SESSION 8 (ASYNCHRONOUS)

The case of LEGO

Practical Case: LEGO® Products: Building Customer Communities Through Technology (HBS W93C26-PDF-ENG)

SESSION 9 (LIVE IN-PERSON)

Open Innovation and Demand pull vs Technology Push debate

Book Chapters: Schilling, M. A. Strategic Management of Technology Innovation. Mc Graw Hill, New York, 5th Edition (See Bibliography)
Article: Why companies should have open business models (HBS SMR231-PDF-ENG)
Article: Using open innovation to identify the best ideas (HBS SMR466-PDF-ENG)

SESSION 10 (LIVE IN-PERSON)

Innovation and Experimentation via Users

Article: The Discipline of Business Experimentation (HBS R1412D-PDF-ENG) (p. 70-79)
Article: Connect and Develop: Inside Proctor & Gamble's New Model for Innovation (HBS R0603C-PDF-ENG) (pgs 58-67)

SESSION 11 (LIVE IN-PERSON)

Lead User Method

Article: Lead User Analyses for the Development of New Industrial Products (Management Science 34 (5), 1998, pgs. 569-582) (CED)
Article: To Stay Ahead of Disruption's Curve, Follow Lead Users (HBR, 2012) (CED)
Article: The Age of the Consumer-Innovator (HBS SMR397-PDF-ENG) (p. 27-35)

SESSION 12 (ASYNCHRONOUS)

Lead User Assignment

Ad hoc material will be distributed before the session

SESSION 13 (LIVE IN-PERSON)

MIDTERM EXAM

SESSION 14 (LIVE IN-PERSON)

Organizing for Innovation and Managing New Product Development

Book Chapters: Schilling, M. A. Strategic Management of Technology Innovation. Mc Graw Hill, New York, 5th Edition; Capter 10 and 11 (See Bibliography)

SESSION 15 (LIVE IN-PERSON)

Organizing Teams for Innovation

Book Chapters: Schilling, M. A. Strategic Management of Technology Innovation. Mc Graw Hill, New York, 5th Edition; Chapter 12 (See Bibliography)
Book Chapters: Clark, Kim, and Steven Wheelwright. "Organizing and Leading Project Teams." Chapter 8 in Revolutionizing Product Development. Free Press, 1992 (See Bibliography)

SESSION 16 (LIVE IN-PERSON)

Protect Innovation: Appropriability Regimes and IP value

Article: Discovering New Value in Intellectual Property (HBS R00109-PDF-ENG)
Other / Complementary Documentation: Intellectual Property (Durham University; Youtube)
Article: Why South Korea's Samsung Built the Only Outdoor Skating Rink in Texas (HBS Research Brief, 11.06.2018)

SESSION 17 (LIVE IN-PERSON)

Trademark strategies and IPRs in creative industries

Article: Product portfolio performance in new foreign markets: The EU trademark dual system

(Research Policy, 48(1), 2019: 11-21) (CED)
Article: All the great things you can do with trademark data: Taking stock and looking ahead
(Strategic Organization, 18(3), 472-484; 2020) (SAGE)
Article: Evaluating the financial impact of branding using trademarks: A framework and empirical
evidence (Journal of Marketing, 73(6), 2009; 154-166) (Researchgate)
Other / Complementary Documentation: Social norms and intellectual property (TEDxHECParis;
Youtube)

SESSION 18 (ASYNCHRONOUS)

A practical analysis of Patents & Trademarks
Material will be distributed before the class

SESSION 19 (LIVE IN-PERSON)

Technology Commercialization Strategies
Book Chapters: Schilling, M. A. Strategic Management of Technology Innovation. Mc Graw Hill, New
York, 5th Edition. Chapter 7 (See Bibliography)
Article: Profiting from Technological Innovation: Implications for integration, collaboration, licensing
and public policy (Research Policy, Vol. 15, Issue 6, 1986, pgs. 285-305 (only read pages 287-297)
(CED)
Article: The Product Market and the Market for Ideas: Commercialization Strategies for Technology
Entrepreneurs (Research Policy, Vol. 32, Issue 2, 2003, pgs. 333-350) (SSRN)
Article: All Over But The Streaming (Bloomberg Businessweek, August 5th 2019, pgs. 10-13) (CED)

SESSION 20 (LIVE IN-PERSON)

Patent infringement, litigation, and patent trolls
Other / Complementary Documentation: Slides - handhout

SESSION 21 (ASYNCHRONOUS)

Conceptual Mapping
Material will be distributed before class

SESSION 22 (LIVE IN-PERSON)

Financing Intellectual Property
Working Paper: Financing Innovation (NBER Working Paper 20676, 2014) (CED)
Article: Financial dependence and innovation: The case of public versus private firms (Journal of
Financial Economics 124, pp. 223-243, 2017) (CED)

SESSION 23 (ASYNCHRONOUS)

IP Portfolio Management
Practical Case: Le Petit Chef (HBS 602080-PDF-ENG)

SESSION 24 (LIVE IN-PERSON)

Ecosystems & Platforms

Book Chapters: Shapiro, Carl and Hal Varian, Information Rules, Chapter 7, pgs 173-218 (See Bibliography)

SESSION 25 (LIVE IN-PERSON)

Setting a Standard and Network Effects

Practical Case: Challenging Uber and Lyft with a New Business Model (HBS 616062-PDF-ENG)

SESSION 26 (LIVE IN-PERSON)

Opportunities and Challenges in the field of Strategic Management of Innovation

SESSIONS 27 - 28 (LIVE IN-PERSON)

Case Study Competition

SESSION 29 (LIVE IN-PERSON)

Wrap up of the course

SESSION 30 (LIVE IN-PERSON)

FINAL EXAM

EVALUATION CRITERIA

Please notice that from the beginning of the course, you will be assigned to a workgroup. Your final grade in the course will be based on both individual and group work and will be weighted according to the overview below.

The evaluation of the class complies with the following rules:

- A necessary requirement to pass the course is to a**chieve a minimum grade of 4.5 on the Final Exam**. If *a student completes the Midterm Quiz, an average of 4.5 in the Midterm Quiz and Final Exam is sufficient to pass the course. If the minimum threshold of 4.5 is not reached, the course is to be evaluated as FAILED.* Students will have to retake the exam in the extraordinary call in June/July and will lose their grades for the asynchronous assignments, case study competition, and participation.
- **Examinations cannot be rescheduled for any reason**. This applies to the Midterm Quiz, the Final Exam, and the Case Study Competition. Students who do not show up to an examination will receive an evaluation equal to 'zero' for the respective examination. [The only exception for the Final Exam and every in-class evaluation is a dispensa or a justification from the BBA office provided upon the presentation of official (medical) documentation. If a justification is provided to skip the Final Exam, the student will take the exam in the extraordinary call of June/July.]
- **In case of severe IT problems during an examination**, the course coordination together with the strategy department chair can consider an ad hoc alternative evaluation or exam. **This includes the possibility of an oral exam.**

The examination of the course will include the following elements that will be weighted according to the provided overview:

A. FINAL EXAM (50%): The Final Exam will test the content from Sessions 1 to 30 and includes the discussed content from the indicated readings (incl. textbooks), slides, case studies, and notes.

B. MIDTERM QUIZ (10%): The Midterm Quiz is an individual examination that will test the content of the class (Sessions 1 to 12). This test aims to allow students to receive an indication of how they are keeping up with the class content and "training" for the Final Exam. **The Midterm Quiz is voluntary and an opportunity to improve a student's grade in the final exam: the Midterm Quiz will only be included in the overall evaluation of the class if its outcome improves a student's overall grade of the course.** That is, the Midterm Quiz will only be included in the overall evaluation of the course if the grade of the Midterm Quiz exceeds a student's grade in the Final Exam. **Otherwise, the Final Exam will count 60% toward the overall course evaluation**. This will also be the case if a student misses the Midterm Quiz.

C. ASYNCRONOUS ASSIGNMENTS (15%): Asynchronous assignments are group-based. They consist of self-study material and exercises that need to be completed in Workgroups and submitted according to the provided deadlines and instructions. Asynchronous assignments test students' ability to apply course content from the preceding sessions.

D. CASE STUDY COMPETITION (15%): The case study competition will take place in sessions 27- 28 and is a Group task. Students will be assigned a short business case with questions and are asked to provide well-grounded recommendations to solve the case in form of a presentation. The presentation has to include slides submitted via Blackboard. Grades will be ranked on a competitive basis.

E. PARTICIPATION (10%): Successful individual participation in class requires attendance and compliance with IE's and the class code of conduct. Participation is an individual grade and will be evaluated based on the following criteria:

1. *Depth and Quality* of a student's contribution to the class: High-quality comments distinguish by their depth of insight, rigorous use of case evidence, consistency of argument, and realism.

2. *Moving Your Peers' Understanding:* Great ideas can be lost through a poor presentation. A high-quality presentation of ideas is concise and clear and considers the relevance and timing of comments and the flow of the ensuing class discussion.

3. *Frequency*: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. Once a sufficient threshold quantity is met, increased "airtime" does not automatically improve your evaluation and evaluation depends on the comments' quality. Students are expected to make active attempts to contribute to the class debate regularly and not only wait for the instructor's invitation to contribute.

criteria	percentage	Learning Objectives	Comments
Final Exam	50 %		Please see description A) above
Intermediate tests	10 %		Please see description B) above
Individual work	0 %		
Individual presentation	0 %		
Group Work	15 %		Please see description C) above
Other	0 %		

Group Presentation	15 %		Please see description D) above
Class Participation	10 %		Please see description E) above

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The *Extraordinary Call Evaluation* criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.).

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), *students will have a possibility to attend a review session* (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- *Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program.* Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

- In case you *decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again* for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Compulsory

 - Melissa Schilling. (2022). *Strategic management of Technological innovation.* 7th edition. McGraw-Hill Education. ISBN 9781265073350 (Printed)

Recommended

 - Carl Shapiro and Hal R Varian. (1999). *Information rules: a strategic guide to the network economy.* Harvard Business School Press. ISBN 087584863X (Digital)

 - FT Rothaermel. (2020). *Strategic Management.* McGraw-Hill College. ISBN 1264103794 (Digital)

 - Richard N Foster. (1986). *Innovation : the attacker's advantage.* Summit Books. ISBN 0671622501 (Digital)

 - Clayton M Christensen. (2011). *The innovator's dilemma.* Harperbusiness. ISBN 9780062060242 (Digital)

 - Steven C Wheelwright and Kim B Clark. (1992). *Revolutionizing product development.* Free Press. ISBN 0029055156 (Digital)

BEHAVIOR RULES

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STRATEGIC MARKETING AND BRANDING

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 SMB-NBA.1C.m.OPT.M.B

Area Marketing and Communication

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **RAMON MENDEZ RODRIGUEZ**

E-mail: rmendez@faculty.ie.edu

Brand Strategist and expert in Marketing, Branding, Innovation & Consumers, with more than 19 years in both top FMCG companies (Unilever & Kraft) and also Consulting companies. Professor at IE since 2010.

Proffessional experience:

- From 2017: **Brand strategist and Marketing & Branding Consultant**. Independent consultant.

- From 2012: **BMC Strategic Innovation Company** (Branding, Consumer and Innovation Agency, working with top global companies, such as **Coca Cola, Heineken, Unilever, Nespresso, BBVA**,…)
    - Regional Manager for Europe and Africa (from Sept'14)
    - Contents Director Europe BMC Strategic Innovation Company (managing mainly the account of **Coca-Cola**)

- From 2012: Marketing Professor, Marketing electives coordinator at IE University

- 2003-2012: Different Marketing roles in **Mondelez/Kraft**. Marketing Director **Tassimo & Saimaza**, Marketing Manager **Oreo, Chips Ahoy!**, Brand Manager **Milka & Philadelphia**...

- 2000-2003: Brand **Dove. Unilever**

Educational background:

- 2017-2019: Master in Humanistic Psychology by Universidad de Alcalá

- 2006 - 2012: Marketing Academy inn Kraft Foods, completing different course in branding, strategy, consumer, insights...

- 1996-2000: B.Sc. (Hons.) Economics, majored in Marketing. Universidad Autónoma de Madrid. rmendez@faculty.ie.edu

PREREQUISITES

No prerequesites needed to take this course

SUBJECT DESCRIPTION

The past decade has seen the triumph of brand and branding: everyone are now encouraged to think themselves of as a brand. Indeed, the term brand is probably overused nowadays. Everything is about brand, branded content, branded environments, branded experience...

Branding is a crucial and exciting topic, which is rapidly evolving in order to connect products with consumers in a more relevant and resonating way. Great brands succeed in creating value for consumers with a clear product role and therefore driving business results. That's why main companies are becoming more and more consumer-centric and brands and products are evolving their relationship with consumer.

A winning brand strategy should start with a in-depth consumer understanding, which together with market situation analysis and evaluation of your current marketing mix will allow to build relevant, resonating, differentiating brands, which can really make a difference in context of hyper-segmented consumers a increasingly competitive market.

This course will provide the students with a practical understanding of the brand strategy and identity, working with many real examples of companies and brands and being able to create their own brand plan and design one brand identity.

LEARNING OBJECTIVES

This course will provide the student with the following knowledges and skills following a highly practical methodology:

1. Brands today. How to be different & relevant with your brand in a crowded and competitive markets.

2. Customer centricty in branding today. Motivational map and Censydeam model

3. Brands & Branding: Defining a winning brand strategy

- Positioning, Benefit ladder, Brand Essence

- Point of Difference and Frame of Reference

- Brand Territory

4. Brand Equity: The brand value in consumer mind (Awareness, Associations, Perceived Quality and Loyalty) and how to measure it.

5. Brand Dilemmas: Brand stretch, Brand repositioning or revitalizing and Brand deletion.

6. Portfolio Management

7. Iconic brands and brand purpose

8. Brand Design and identity

9. Many brand examples and benchmarks!

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	23.33 %	35.0 hours
Discussions	16.67 %	25.0 hours
Exercises in class, Asynchronous sessions, Field Work	13.33 %	20.0 hours
Group work	16.67 %	25.0 hours
Individual studying	30.0 %	45.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

STRATEGIC MARKETING AND BRANDING - INTRODUCTION

- Presentation and expectation of program
- The impostance of strategy for long term brand growth
- Strategic Marketing role in companies
- Overview of a brands and branding. Functions of brands: Consumers & companiesBranding: Where business meets psychology!

Activity:

- *Discussions of best brands and learnings*

SESSION 2 (LIVE IN-PERSON)

MARKETING PLAN

- Marketing strategic framework: A consumer-centric approach
- Brands and branding in a Marketing plan
- Overview and stages of a Marketing plan
    - Analysis
    - Objectives and strategy
    - 360º execution
    - KPI's Metrics
    - Benchmarks

SESSION 3 (LIVE IN-PERSON)

OVERVIEW 4 GROWTH STRATEGIES & FOCUS IN PENETRATION

- Overview of growth strategies: Penetration, Frequency, Retention, Premimization
- Focus in Penetration

Activity: Discussion of best cases and learnings

SESSION 4 (LIVE IN-PERSON)

GROWTH STRATEGIES & FOCUS IN FREQUENCY, RETENTION & PREMIUNIZATION

Overview of growth strategies: Penetration, Frequency, Retention, Premimization
Focus in Penetration
Activity: Discussion of best cases and learnings

SESSION 5 (LIVE IN-PERSON)

CUSTOMER CENTRICITY IN BRANDING

- 4 levels of Consumer insights: Cultural insights, Human insight, Category insights & Brand insights
- The Value of Motivational Segmentation: Motivational Map & Censydeam model
- Persona & Customer journey

Activity:

- *Define the persona and main motivations of some brands*
- *Plotting different brands in different motivational spaces*

SESSION 6 (LIVE IN-PERSON)

BRAND POSITIONING IN ACTION

- Reading: Brand Positioning. Kellogg on Branding (Kellogg School of Management) with questions

Activity:

- *Analyse one brand based on the model in the video and write your brand positioning statement in the forum (in pairs)*

Book Chapters: Brand Positioning in "Kellogg on Branding" (CED)
Video: Inputs for developing your brand (IE Media)

SESSION 7 (LIVE IN-PERSON)

BENEFIT LADDER

- Functional vs. emotional
- Benefit ladder
- Laddering up strategy and laddering down
- Choosing your point of difference

Activity:

- *In class training benefit ladderLadder exercise in pairs*

SESSION 8 (LIVE IN-PERSON)

BENEFIT LADDER, BRAND TERRITORY & ESSENCE

- Laddering up vs. laddering down strategy
- Links with consumer insights
- Brand territory
- Brand essence

Activity:

- *Video Brand Essence Volkswagen. Discuss their brand territory and essence*

SESSION 9 (ASYNCHRONOUS)

DOVE, A LADDERING-UP CASE

Business Case: Dove, evolution of a brand (HBS 508047-PDF-ENG):

Description: Examines the evolution of Dove from functional brand to a brand with a point of view after Unilever designated it as a Masterbrand, and expanded its portfolio to cover entries into a number of sectors beyond the original bath soap category. The development causes the brand team to take a fresh look at the clichés of the beauty industry. The result is the controversial Real Beauty campaign. As the campaign unfolds, Unilever learns to use the Internet, and particularly social network media like YouTube, to manage controversy.

Activity:

Read the case and asnwer the following questions:

- *Write the 3 levels of consumer unndertanding: Human Insight, Category insight and brand insight*
- *Develop the full DOVE benefit ladder*
- *What you would recommend to this brand today?*

Max. 150 words

Practical Case: Dove: Evolution of a Brand (HBS 508047-PDF-ENG)

Multimedia Material: Dove: Video Advertising Distributed by Harvard Business School (HBS 6558-AVO-ENG)

SESSION 10 (LIVE IN-PERSON)

BRAND EQUITY

- Brand Equity definition and key assets (Awareness, Associations, Perceived quality, Loyalty & Experience).
- Types of brand awarenes: Top of mind, Recall, Recognition
- Types of brand associations: Product and Non-product related

Activity:

- *Role play Interview for brand equity assesment (pairs)*

SESSION 11 (LIVE IN-PERSON)

BRAND EQUITY - PERSONALITY & ARCHETYPE

- What's an archetype? Archetypes vs. stereotypes
- Brand personality: Key to connect with customer values12 brand archetypes

Activity:

- Analysing brand archetypes (pairs)

SESSION 12 (ASYNCHRONOUS)

BRAND EQUITY IN ACTION

Activity:

- *Choose one brand (pairs)*
- *Interview 10 people to understand its equity in depth (5 each)*
- *Discuss with your pair to analyse and undertand*
- *Analyse its current brand equity and share your reco for the brand today.*
- *Share in forum your conclusions (maximum 100 words)*

SESSION 13 (LIVE IN-PERSON)

MEASURING BRAND EQUITY

- Qualitative and quantitive techniques to measure brand equity
- Free association vs. projective questions
- ZMET: Zaltman Methaphor Elecitacion Techniques
- Case Nestlé Crunch (519061-PDF-ENG)

Practical Case: Understanding the Brand Equity of Nestlé Crunch Bar: A Market Research Case (HBS 519061-PDF-ENG)
Video: Olson Zaltman: Intro to ZMET (Youtube)

SESSION 14 (LIVE IN-PERSON)

PRIVATE LABELS BRANDS

- Private labels growth in a more branded context
- Are they brands? Pros and cons of Private labels today
- Possible strategies to fight with private labels

Video: What is Private Label? (Youtube)

SESSION 15 (ASYNCHRONOUS)

STARBUCKS CASE

Description: After going public in 1992, Starbucks' strong balance sheet and double-digit growth made it a hot growth stock. The Starbucks vision was coffee culture as community, the Third Place between work and home, where friends shared the experience and exotic language of gourmet coffee. Its growth was fuelled by rapid expansion in the number of stores both in the United States and in foreign markets, the addition of drive-through service, its own music label that promoted and sold CDs in stores and other add-on sales, including pastries and sandwiches. In an amazingly short time, Starbucks became a wildly successful global brand. But in 2007, Starbucks' performance slipped; the company reported its first-ever decline in customer visits to U.S. stores, which led to a 50 per cent drop in its share price. In January 2008, the board ousted CEO Jim Donald and brought back Howard Schultz - Starbucks' visionary leader and CEO from 1987 to 2000 and current chairman and chief global strategist - to re-take the helm. Starbucks' growth strategies have been widely reported and analysed, but rarely with an eye to their impact on the brand. This case offers a compelling example of how "non-brand" managerial decisions - such as store locations, licensing arrangements and drive-through service - can make sense on financial criteria at one point in time, yet erode brand positioning and equity in the longer term. Examining the growth decisions made in the United States provides a rich context in which to examine both the promise and drawback of further foreign expansion.

Read the case and asnwer the following questions:

- How did startbuck build their brand equity?
- What were the main reasons for the company downturn?
- What would you recommend them today to drive growth'

Max. 150 words

Practical Case: Trouble Brews at Starbucks (HBS 909A02-PDF-ENG)

SESSION 16 (LIVE IN-PERSON)

CREATING AND LAUNCHING NEW BRANDS

- Starting from scratch: Key strategic questions
- Full launching process; from creation to executtion
- Branding in start ups
- Choose one great new brand and assess its success factors in the forum (pairs)

SESSION 17 (LIVE IN-PERSON)

NEW BRANDS & BRAND DILEMMAS

- Launching new brands
- Consistent brands: Sustaining brands over time
- 4 brand dilemmas:
    - Brand stretch
    - Brand repositioning
    - Brand revitalization
    - Brand Deletion

SESSION 18 (LIVE IN-PERSON)

BRAND DILEMMAS

- Deeping into the 4 brand dilemmas:
    Brand stretch
    Brand repositioning
    Brand revitalization
    Brand Deletion

Activity:

- *Discussing pros and cons of each dilemmas*

SESSION 19 (ASYNCHRONOUS)

BRAND DILEMMAS IN ACTIONS

Activity:

- *Sharing one good and bad examples of each dilemma in the forum, explaining briefly your reasons to choose thes examples.*

SESSION 20 (LIVE IN-PERSON)

BRANDS & PORTOLIO MANAGEMENT

- The four levels of strategy: Corporate, portfolio management, Positioning & Marketing Mix
- Portfolio Management: Minimizing overlapping & maximizing reach
- Brands vs. corporate strategies: House of brands vs. branded house
- Brand hierarchy & types of brand

SESSION 21 (ASYNCHRONOUS)

CORPORATE & BRANDS ANALYSIS

- *Choose one company with different brands (pairs)*
- *Analyse if it's a house of brands, branded house or hybrid*
- *Explain how you think that this company manages its brands and product portfolio today*

SESSION 22 (LIVE IN-PERSON)

ICONIC BRANDS

- What is an iconic brand?
- Brand purpose
- Golden circle: Why, How and Why
- Benchmark of Iconic brands

Activity:

- *Discussing iconic brands. What's their pledge?*

Multimedia Documentation: Cultural Branding: How Brands Become Icons (Logo & Imago MS Blog)
Video: How great leaders inspire action (Ted.com)

SESSION 23 (LIVE IN-PERSON)

BRAND ELEMENTS & IDENTITY

- Brand elements to build brand equity - Making it real and visual!
- Designing your brand identity
- Brand identity book and guidelines:

Slides and material in additional documentation

SESSION 24 (LIVE IN-PERSON)

DESIGNING YOUR BRAND IDENTITY

- Innovation in branding
- Create a new brand, leveraged on powerful consumer insights.
- Define your main point of difference (functional or emotional)
- Design your brand elements: Brand name, logo, slogan, character, packaging
- Define your brand guidelines: Colours, tone...

SESSION 25 (ASYNCHRONOUS)

SHARE YOUR NEW BRAND DESIGN

Activity:

- *Design and share your final design (one page) in forum*
- *Voting for the best new brand*

SESSION 26 (LIVE IN-PERSON)

WORKING SESSIONS WITH PROFESSOR

Working session in class with each team to guide and support for final project presentation

SESSIONS 27 - 28 (LIVE IN-PERSON)

TEAM BRAND PROJECT PRESENTATION

SESSIONS 29 - 30 (LIVE IN-PERSON)

FINAL EXAM: WRITTEN (30 Min) AND ORAL (2 min per student)

The exam is closed book and will consist of 3 open-ended questions to apply theory (30 min). Every student will defend one their answer in front of professor (scheduled 2 minute per student).

EVALUATION CRITERIA

It's required to work outside the class, doing the exercises, participating in forum, doing presentations and a final project. Both individual and group work will be taken into account in the final grade.

It is important to be respectful and proactive during in-class sessions as well as in the group projects, For the group project, students will choose who they will work with.

During the entire course, the students will receive feedback on the activities they are presenting, so they can keep track of their grade and be in control of it. Attendance will also be taken into account daily for the very same reason.

Evaluation criteria details:

- **In-Class participation(15%)**: Attendance is mandatory and will, therefore, have an impact on the final grade. Discussions and debates will count towards participation (including the one in forum). this grade (participation, engaged listening, self-involvement in class...).Participation will be evaluated according to attention paid, participation in discussions and debates and general involvement within the course.
- **Individual work in forums (25%):** Each students will have to write and share their analysis in forums, showing his/her concepts knowledge and understanding, as well as his/her point of view
- **Final Team Project (30%)**: Each student will be part of a group project that will have to be presented by the end of the term. You will have to create a new brand. Specific briefing and details will be presented in class prior to the due date and uploaded to Campus. Teams will have supervised working sessions with the professor.
- **Final Exam 30%**): 3 open-ended questions to apply theory to real cases and defend it.

criteria	percentage	Learning Objectives	Comments
Final Exam	30 %		
Individual Work Forums	25 %		

Group Presentation	30 %		
Class Participation	15 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

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- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

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Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

- Kevin Lane Keller. *Strategic Brand Management.* ISBN 9780133255423 (Printed)
- Alice M.Tybout & Tim Calkins. *Kellogg on Branding.* ISBN 9780471690160 (Printed)
- Byron Sharp. *How Brands Grow.* ISBN 9780195573565 (Printed)
- Alina Wheeler. *Designing Brand Identity.* ISBN 9781118099209 (Printed)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

Please, check the University's Attendance Policy here. The Program Director may provide further indications.

ETHICAL POLICY

Please, check the University's Ethics Code here. The Program Director may provide further indications.

SUSTAINABLE FINANCE

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 SF-NBA.1C.f.OPT.M.A

Area Finance

Number of sessions: 25

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 5.0

Semester:

Category: OPTIONAL

Language: English

Professor: **EMMA NAVARRO AGUILERA**

E-mail: enavarroa@faculty.ie.edu

Emma Navarro belongs to the High Corps of Spanish State Economists and Trade Experts. She is a Law Graduate from the Universidad San Pablo CEU, with diplomas in EU legal and economic Studies from the same university, the Sorbonne-Paris I University and the Complutense University of Madrid.

Emma Navarro is currently Executive Director for Climate Finance at the European Climate Foundation. She is also a Board member of Iberdrola España, one of the world's largest energy companies and a leader in renewables that is spearheading the energy transition towards a low carbon economy.

Prior to that, she was Vice-President of the European Investment Bank, the world's largest multilateral Bank by assets and largest financier of climate projects. She led its Climate Action Strategy at a time when the institution positioned itself as the EU's Climate Bank and launched its renewed climate ambition.

Emma has also held the position of Chairperson of ICO, the Spanish National Promotional Bank and the State's Financial Agency.

During her extensive career public administration, she served as Spain's Secretary General for the Treasury and Financial Policy, responsible for banking and financial policy regulation and the funding and debt management. She has also been a member of the Board of Bank of Spain, of the National Securities Market Commission (CNMV), of the FROB (the Spanish Executive Resolution Authority) and the Vice-Chairperson of Governing Committee of the Deposit Guarantee Fund.

She has represented Spain in European and international financial bodies, as a member of the EU's Economic and Financial Committee (EFC) and the Eurogroup Working Group (EGW), as an alternate member of the Eurogroup and ECOFIN, and as alternate representative to the G20-Finance track meetings. She has also served as a Board Member of the European Stability Mechanism (ESM) and a member of the Financial Stability Board (FSB).

While at the International Monetary Fund, Emma worked as an adviser to the Executive Board Director for Colombia, Mexico and Spain.

enavarroa@faculty.ie.edu or using blackboard ultra.

Office Hours: Mondays: 18h00-19h00. Fridays: 9h00-10h00.

PREREQUISITES

Basic knowledge of finance and economy is expected.

SUBJECT DESCRIPTION

The goal of this course is to explore the foundations of Sustainable Finance. Students will develop theoretical and practical knowledge and understanding of the main debates around CSR and Sustainable Finance.

Sustainable Finance is one of the most trending topics in Finance today. A fundamental reshaping of finance is taking place to integrate Environmental, Social and Governance issues (the so-called ESG factors) into investment decisions and business strategies. At the same time, there is growing acknowledgment that finance can be a powerful tool to transform our economic and social model towards sustainability.

ESG investments have increased exponentially in the last years, while green and other sustainable products have soared. Investors are more and more scrutinizing companies' efforts to manage sustainability risks and opportunities, which has driven demand for company data on ESG related performance and resulted in a proliferation of competing reporting frameworks and guidelines. In response, International Sustainability Reporting Standards are being now elaborated, while some jurisdictions are also developing or strengthening mandatory climate or ESG disclosure regulations.

Climate change is also increasingly founding their way into shareholders meetings. At the same time, a social movement that highlights the shortcomings of the current economic system has emerged and is resonating in the business community in what is being called stakeholder capitalism.

Recognition by financial supervisors, regulators and investors that climate change is a source of financial risk is rapidly transforming sustainable finance from niche to mainstream. A growing number of financial supervisors have started to incorporate climate change risk management into their supervisory expectations, and some of them have also embarked on climate stress testing. In addition to that, the ECB and other central banks are increasingly incorporating climate risks considerations into their monetary policy frameworks.

The covid-19 pandemic had accelerated the ESG momentum and has triggered debates on the opportunity to rebuild economies placing sustainability and corporate purpose well-entrenched at the core. And while the war in Ukraine is bringing new uncertainties and risks of backlash, the

Against this background, developing a critical mass of experts on Sustainable Finance is key for the continued expansion and promotion of this increasingly important approach to finance.

LEARNING OBJECTIVES

The main objectives of this course are the following:

- Develop background knowledge and understanding of the main debates around Corporate Social Responsibility and Sustainable Finance
- Overview of the key international agreements and frameworks supporting sustainable finance
- Reflect on the challenges and opportunities posed by climate change and the transition to a more sustainable economy
- Assess how ESG factors affect the value creation and risk of a company
- Recognize how investors are integrating ESG considerations into their investment decisions.
- Familiarize with sustainable financial products and ESG metrics and reporting frameworks
- Understand the implications of climate change for the financial sector and be able to explain the different types of climate-related risk
- Be cognizant of the role of MDBs in promoting sustainability and mobilizing finance towards sustainable projects.

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	14.4 %	18.0 hours
Discussions	17.6 %	22.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	25.0 hours
Group work	24.0 %	30.0 hours
Individual studying	24.0 %	30.0 hours
TOTAL	100.0 %	125.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

1. Introduction to the course. What to expect from this course?
2. What is Sustainable Finance? Why it matters?
3. Sustainability challenges today and the role of the financial sector.

SESSION 2 (LIVE IN-PERSON)

AN INTRODUCTION TO SUSTAINABLE FINANCE

1. Context and trends. Understanding the evolution and growth of Sustainable Finance. Impact of the Covid-19 pandemic.
2. Challenges and Opportunities for Sustainable Finance.
3. The EU Sustainable Finance Agenda

Pre-class reading:

Article: What is sustainable finance? (The Economist) (CED) (Optional)
Article: Sustainability as BlackRock's New Standard for Investing (BlackRock web) (Optional)

SESSION 3 (LIVE IN-PERSON)

SUSTAINABILITY AND CORPORATE SOCIAL RESPONSIBILITY. THE SDG.

1. Sustainability as an investment strategy vs. as an organization approach. Corporate Social Responsibility.
2. What is the purpose of a corporation? From the shareholders primacy norm to the Stakeholders Value Approach.
3. A new concept of fiduciary duty?
4. The triple bottom line: profit, people and planet.
5. Sustainable corporate strategy and leadership. The duty of Corporate Boards in driving sustainability.
6. Integrating sustainability into the value chain.

Pre-class readings:

Article: Business Roundtable Redefines the Purpose of a Corporation to Promote An Economy That Serves All Americans (Business Roundtable. August 19, 2019)
Article: C.E.O.s Are Qualified to Make Profits, Not Lead Society (The New York Times. July 24, 2020) (CED)

SESSION 4 (LIVE IN-PERSON)

KEY INTERNATIONAL DRIVER OF SUSTAINABLE FINANCE (PART 1)

1. The Role of the United Nations in the promotion of Sustainable Finance. The Sustainable Development Goals.
   Other frameworks promoting the integration of Sustainability into investment decision-making.
2. Understanding the science and impacts of Climate Change.
3. The Paris Climate Agreement and progress in climate change conferences.
4. Climate change mitigation and adaptation.
5. The concept of Just Transition.

Practical Case: Climate Change in 2020: Implications for Business (Pre-reading) (HBS 320087-PDF-ENG) (Optional)
Article: The great disrupter. Business and climate change (Pre-reading) (Special Reports The Economist) (Optional)
Article: Acting on climate-on-climate-and-poverty: if we fail on one we fail on the other (LSE) (Optional)

Article: Key aspects of the Paris Agreement (Reference) (United Nations)

SESSION 5 (LIVE IN-PERSON)

CLIMATE CHANGE AS AN INTERNATIONAL DRIVER OF SUSTAINABLE FINANCE. (Part 2).

1. Climate Neutrality pledges. What is a transition plan?
2. Carbon Pricing. Why? Modalities.
3. Voluntary Carbon Markets.
4. Green Finance and Transition Finance.

Article: Pricing Carbon (World Bank) (Optional)

Article: The Voluntary Carbon Market and Sustainable Development (Grantham Research Institute on Climate Change and the Environment)

SESSION 6 (ASYNCHRONOUS)

UNDERSTANDING THE IMPORTANCE OF CORPORATE GOVERNANCE. HBR CASE STUDY DISCUSSION: THE VOLKSWAGEN EMISSIONS SCANDAL

Students will prepare this case study to engage in an on-line forum discussion to present their views and thoughts, guided by some questions outlined by the professor. The case study highlights the corporate governance issues and failures behind the diesel scandal that affected Volkswagen some years ago.

Practical Case: The Volkswagen Emissions Scandal (HBS UV7245-PDF-ENG)

SESSION 7 (LIVE IN-PERSON)

THE ESG FINANCIAL ECOSYSTEM

1. The ESG financial Ecosystem.
2. How green is a company? Indicators of Environmental performance. Carbon footprint. Other environmental metrics.
3. Measuring the carbon footprint of a portfolio.
4. What is the Circular Economy?

Article: ESG Investing and Climate Transition: Market Practices, Issues and Policy Considerations (OECD)

SESSION 8 (LIVE IN-PERSON)

THE ESG FINANCIAL ECOSYSTEM (Part 2).

1. Diving into the social factors of ESG. Examples.
2. Good governance as an overriding principle for ESG.
3. ESG Ratings and challenges.

Article: ESG Investing and Climate Transition. Market Practices, issues and policy considerations (OECD)

SESSION 9 (LIVE IN-PERSON)

Sustainability Topics:

- Economic Development

ESG REPORTING AND MEASUREMENT
  - Why sustainability disclosures are important?
  - ESG main metrics and reporting frameworks.
  - Determining material factors.
  - The Task Force for Climate Related Disclosures. (TCFD).
  - Towards global sustainability and Climate reporting standards. The ISSB.
  - The EU Non-Financial Reporting Directive. The proposal for a Corporate Sustainability Reporting Directive. The double materiality principle.
  - The US climate disclosure rules.

Article: ESG Metrics: Reshaping Capitalism? (HBS 116037-PDF-ENG)

Article: Recommendations of the Task Force on Climate-related financial disclosures (TCFD)

Article: ESG Investing and Climate Transition: Market Practices, policies and challenges (OECD)

SESSION 10 (LIVE IN-PERSON)

INTEGRATING ESG FACTORS INTO INVESTMENT DECISIONS. ESG INVESTMENT STRATEGIES.

1. ESG Investment Strategies.
2. Exclusions.
3. Best-in-Class.
4. ESG Integration.
5. ESG engagement.
6. Impact investments.

SESSION 11 (LIVE IN-PERSON)

There will be a mid-term quiz to assess understanding of the topics covered thus far.

SESSION 12 (LIVE IN-PERSON)

ESG: VALUE CREATION AND FINANCIAL PERFORMANCE

1. Understanding how ESG factors influence the value creation and financial performance. Examples.
2. Evidence on ESG corporate and investment performance. "Doing well by doing good"?

Article: Five ways that ESG creates value(Optional)

Multimedia Material: Musings on Markets: Sounding good or Doing good? A Skeptical Look at ESG(Optional)

Article: The Secret Diary of a Sustainable Investor (part 1) (medium.com)

Article: A Critique Of Tariq Fancy's Critique Of ESG Investing: An Interview With Clara Miller (Forbes) (Optional)

SESSION 13 (ASYNCHRONOUS)

SUSTAINABLE INVESTMENT INTEGRATION.

Students will be presented with press articles that explore the topics covered in the session such as climate disclosures or the advantages and disadvantages of different investment strategies or ESG impact on financial performance. They will have a discussion on the articles, guided by questions prepared by the professor.

SESSION 14 (LIVE IN-PERSON)

WHAT IS REALLY IS A SUSTAINABLE INVESTMENT? ADDRESSING "GREENWASHING"

1. The concept of green washing. How to address greenwashing?
2. Sustainable Taxonomies. The EU Taxonomy.
3. The role of gas and nuclear in the EU Taxonomy.
4. Other taxonomies.

Technical note: What is the EU Taxonomy and how does it work in practice (European Comission)
Article: Green Taxonomies Around the World. Where do we stand? (ECOFACT)

SESSION 15 (LIVE IN-PERSON)

Sustainability Topics:

- Environment

GREENING THE FINANCIAL SYSTEM

1. What are climate-related financial risks? Physical risk and Transition Risks.
2. Stranded Assets.
3. The role of the Central Banks in addressing climate change. The Network for Greening the Financial System.
4. Greening Monetary Policy.
5. Greenflation.

Article: Breaking the Tragedy of the Horizon. Climate Change and financial Stability (Pre-class reading) (BIS central bankers' speeches; September, 29th 2015)
Article: Letter to CEOs: A fundamental Reshaping of Finance (Pre-class reading) (BlackRock)
Article: A new age of energy inflation: climateflation, fossilflation and greenflation. (Pre-class reading) (European Central Bank)
Article: Network for Greening the Financial System (Reference) (NGFS.Net)

SESSION 16 (ASYNCHRONOUS)

UNDERSTANDING CLIMATE RISKS AND OPPORTUNITIES FOR BANKS

In this session, students will engage on a discussion on the risks and opportunities climate change present and the changes Banks are undertaking to address them.

The students will prepare the discussion with some reading materials that they will be given beforehand.

SESSION 17 (LIVE IN-PERSON)

SUSTAINABLE FINANCE BY ASSET CLASSES

1. ESG funds and SRI funds. ESG Passive Investments.
2. Green Bonds and the Green Bond Principles. The EU Green Bond Standard.
3. Other Thematic Bonds. Social Bonds and Sustainability Bonds.

4. Green Loans and Green Loan Principles.
5. Other Green Products.
6. PPAs as a product to support the energy transition.

Article: What is the point of green bonds? (The Economist) (CED)

SESSION 18 (ASYNCHRONOUS)

EXPLORING THE CHALLENGES OF THE ENERGY TRANSITION

Students will discuss the challenges of the energy transition for companies and the global economy, based on the questions and articles and other materials provided by the teacher before hand.

SESSION 19 (LIVE IN-PERSON)

MOVILIZING CAPITAL TOWARDS SUSTAINABLE INVESTMENTS.
1. The role of the public sector. Green Public Investment Programs.
2. Green Budgeting.
3. The role of Multilateral Development Banks. Business model and History.

SESSION 20 (LIVE IN-PERSON)

MOBILIZING CAPITAL TOWARDS SUSTAINABLE INVESTMENT.
1. Understanding how Multilateral Development Banks work.
2. Leveraging private sector investment. What is Blended Finance? Examples
3. MDB's efforts to aligning operations with the Paris agreement.
4. Reforming MDBs to deal with global challenges.

Article: How to reform multilateral development banks to take on climate change (Energy Monitor; April 10, 2023) (Optional)

SESSION 21 (LIVE ONLINE)

In this session, we will have a guest speaker that works for a Multilateral Development Bank (MDB) to present through practical cases the challenges and opportunities of sustainable finance within the perspective of a public bank.

SESSION 22 (LIVE IN-PERSON)

Students will need to complete a quiz covering materials of the second-half of the syllabus.

SESSIONS 23 - 24 (LIVE IN-PERSON)

GROUP PROJECT PRESENTATION

In the last day of the course, students will present their group projects.

Students will work in teams of 5-8 people to study the risks and opportunities arising from ESG factors for a particular company. Three companies pertaining to different sectors will be given as a choice. The group assessment should include how ESG factors affect the business model and the financial position of the company and a strategic plan to assess those risks and harness the opportunities.

Book Chapters: Dirk Schoenmaker and Willem Schramade, "Principles of Sustainable Finance"

Chapter 5 (Reference) (See Bibliography)(Optional)
Students could use as a reference Chapter 5 of Dirk Schoenmaker and Willem Schramade. (2019). Principles of Sustainable Finance. Oxford University Press. ISBN 9780198826606 (Printed)

SESSION 25 (LIVE IN-PERSON)

Wrap up session. Final discussion on ESG challenges ahead.

EVALUATION CRITERIA

Class Participation grade (35%) will depend on the quality of their contribution to the class discussion and the ability to move the discussion forward and improve the learning experience of the class.

Quizzes/Tests (30%): During the course, the professor will undertake a few quizzes to test the understanding of the students from pre-reading materials and discussions held in class.

Group Presentation (35%). More guidance on the group presentation will be provided during the course.

criteria	percentage	Learning Objectives	Comments
Intermediate Tests	30 %		
Group Presentation	35 %		
Class Participation and Forums	35 %		

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BIBLIOGRAPHY
Recommended
 - Dirk Schoenmaker and Willem Schramade. (2019). *Principles of Sustainable Finance.* Oxford University Press. ISBN 9780198826606 (Printed)
 - Nuno Fernandes. (2023). *Climate Finance.* First. Finance for Executives. ISBN 9789899885431 (Printed)

   https://www.amazon.com/Climate-Finance-Nuno-Fernandes/dp/9899885436?asin=9899885436&revisionId=&format=4&depth=1

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

Please, check the University's Ethics Code here. The Program Director may provide further indications.

SUSTAINABLE SUPPLY CHAINS

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 SSC-NBA.1C.n.OPT.M.A

Area Others

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **FELIPE AMADO QUINTANA NAVARRO**

E-mail: faquintana@faculty.ie.edu

FELIPE AMADO QUINTANA NAVARRO

Academic background:

- Master in Technology and Communication for teaching by UNED (2013-2014)
- Master in Logistics, Purchasing and Stocks Management by AERCE (2003)
- MBA by IE Business School (1999-2000)
- Industrial engineer by Univesity of Las Palmas de Gran Canaria (1992-1998)

Professional experience:

- MDS (since 2014). Customer Experience and Lean Thinking consultant.
- Aguas Minerales de Firgas (2009-2016): Operations & Supply Chain Manager. New Products Development Responsible (Canary Islands. Spain).
- Robert Bosch (2004-2009): Project Manager for Bosch Car Service Spain and Portugal (Madrid-Lisbon-Kalsruhe)
- LVMH (2000-2004): Operations Responsible for Perfumes Loewe (Madrid-Paris)

Academic experience:

- IE Business Schoo, IE University and IE School of Human Sciences and Technology Adjunct Professor since 2004: Operations Management, Supply Chain Management, Customer Experience Management, Sustainability through SCM and Lean Thinking.

Professor contact and information:

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PREREQUISITES

No special prerequisites are needed to attend this course.

SUBJECT DESCRIPTION

Sustainability is not only a new trend but it is also a "*must"* specially in a business environment because customers are demanding sustainable solutions.

- According to several authors, Business **sustainability**, also known as corporate sustainability, is the management and coordination of environmental, social and financial demands and concerns to ensure responsible, ethical and ongoing success. Within the corporate world, they are sometimes referred to as the triple bottom line: Economic, Social and environmental.

- **Supply Chain Management** is the management of the flow of goods and services and includes all processes that transform raw materials into final products. It involves the active streamlining of a business's supply-side activities to maximize customer value and gain a competitive advantage in the marketplace. This function involves not only internal activities related with Operations management and coordination with the rest of the areas of the company, but also upstream to suppliers and downstrem to customers, including logistics and after sales activities.

    In this 15 sessions elective course we shall discover together how we can achieve sustainability through our Supply Chain Management, which is responsible for more than the 60% of the value addition for customers.

    Join me in this trending topic elective and let us discover together plenty of frameworks, tools and best practices to be able to apply them during your professional career.

LEARNING OBJECTIVES

Main topics and best practices covered by this elective are:

- INTRODUCTION. COMEPTING THROUGH SUSTAINABILITY
- THE 6 FRAMES OF SUSTAINABILITY
- CIRCULAR ECONOMY AND GREEN SUPPLY CHAIN MANAGEMENT
- BEST PRACTICES: SUSTAINABILITY AT IKEA GROUP.
- BEST PRACTICES: WALMART'S SUSTAINABILITY STRATEGY
- TRIPLE A SUPPLY CHAIN. ACHIEVING SUSTAINABILITY THROUGH SUPPLY CHAIN INTEGRATION. BEST PRACTICES: FERRERO GROUP
- COMPETING THROUGH SUSTAINABILITY. BEST PRACTICES: UNILEVER
- SUSTAINABLE GROWTH: LEARNING FROM MISTAKES: STARBUCKS

At the end of the course, students should be able to:

- *Understand how to compete through sustainability*
- *Understand the model of Circular Economy and the Supply Chain Contribution to Circular Economy.*
- *The strategic role of sustainability in the supply chain*
- *How to build a sustainable and green supply chain*
- *How to interpret and ellaborate a "Sustainability Report"*
- *Implement a sustainable supply chain*
- *To analyse the sustainability strategy of any firm*
- *Learn from common mistakes and identify best practices in sustainability*

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	26.67 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	26.67 %	20.0 hours
Group work	20.0 %	15.0 hours
Individual studying	6.67 %	5.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

INTRODUCTION. THE TRIPLE BOTTOM LINE. COMPETING THROUGH SUSTAINABILITY:

Sustainability Challenges, Competencies and Opportunities. The 5 stages model for competing through sustainability.

- Stage 1: Viewing Compliance as opportunity
- Stage 2: Making Value Chain Sustainable
- Stage 3: Designing Sustainable products and services
- Stage 4: Developing new business models
- Stage 5: Creating next-practice platforms

Article: Why Sustainability Is Now the Key Driver of Innovation (HBS R0909E-PDF-ENG)

Article: A More Sustainable Supply Chain (HBS R2002F-PDF-ENG)

SESSION 2 (LIVE IN-PERSON)

INTRODUCTION. THE TRIPLE BOTTOM LINE. COMPETING THROUGH SUSTAINABILITY:

Sustainability Challenges, Competencies and Opportunities. The 5 stages model for competing through sustainability.

- Stage 1: Viewing Compliance as opportunity
- Stage 2: Making Value Chain Sustainable
- Stage 3: Designing Sustainable products and services
- Stage 4: Developing new business models
- Stage 5: Creating next-practice platforms

SESSION 3 (LIVE IN-PERSON)

THE 6 FRAMES OF SUSTAINABILITY:

1. The resources frame
2. The time frame
3. The value frame
4. The design frame
5. The abundance frame
6. The moral frame

SESSION 4 (LIVE IN-PERSON)

THE 6 FRAMES OF SUSTAINABILITY:

1. The resources frame
2. The time frame
3. The value frame
4. The design frame
5. The abundance frame
6. The moral frame

Article: The 6 Ways Business Leaders Talk About Sustainability (HBS H03YII-PDF-ENG)

SESSION 5 (LIVE IN-PERSON)

CIRCULAR ECONOMY AND GREEN SUPPLY CHAIN MANAGEMENT

- Green Supply Chain Management
- Circular Supply Chain
- Recovery and Recycling
- Building product to last
- Sharing Platform
- PaaS business model (Product-as-a-service)

Article: Introducing a Circular Economy: New Thinking with New Managerial and Policy Implications (HBS CMR677-PDF-ENG)
Article: Can One Green Deliver Another? (TCC P0509D)

SESSION 6 (LIVE IN-PERSON)

CIRCULAR ECONOMY AND GREEN SUPPLY CHAIN MANAGEMENT

- Green Supply Chain Management
- Circular Supply Chain
- Recovery and Recycling
- Building product to last
- Sharing Platform
- PaaS business model (Product-as-a-service)

SESSION 7 (LIVE IN-PERSON)

Session 7: ***Midterm exam****.* Professor will give all the indiations for the midterm and will make available a midterm mock for students to practice.

SESSION 8 (LIVE IN-PERSON)

Session 8: ***Sustainability reporting. Tips, formats, identifying green and social washing.***

Each students will analyze a Sustainability Report by one company and will interpret it following the indiations by the professor.

SESSIONS 9 - 10 (ASYNCHRONOUS)

Sustanability through Supply Chain Management AT IKEA:

Activity to be done in groups representing 12.5% of the evaluation criteria of the course.

SESSIONS 11 - 12 (LIVE IN-PERSON)

Session 11: BEST PRACTICES: WALMART'S SUSTAINABILITY STRATEGY

Teamwork presentation (first teams)

Session 12: TRIPLE A SUPPLY CHAIN. ACHIEVING SUSTAINABILITY THROUGH SUPPLY CHAIN INTEGRATION. BEST PRACTICES: FERRERO GROUP.

Teamwork presentation (second teams).

This 2nd and last teamwork activity represents 12.5% of the evaluation criteria of the course.

Practical Case: Wal-Mart's Sustainability Strategy (A) (HBS OIT71A-PDF-ENG)

Article: Triple-A Supply Chain (HBS R0410F-PDF-ENG)

Practical Case: Ferrero Group: Achieving Sustainability Through Supply Chain Integration (HBS W17371-PDF-ENG)

SESSIONS 13 - 14 (LIVE IN-PERSON)

Session13: COMPETING THROUGH SUSTAINABILITY. BEST PRACTICES: UNILEVER

Unilever's New Global Strategy: Competing through Sustainability

Session 14: SUSTAINABLE GROWTH: LEARNING FROM MISTAKES: STARBUCKS

The HBR Interview: Starbucks CEO Howard Schultz

Practical Case: Unilever's New Global Strategy: Competing through Sustainability (HBS 916414-PDF-ENG)

Article: The HBR Interview: Starbucks CEO Howard Schultz (HBS R1007K-PDF-ENG)

SESSION 15 (ASYNCHRONOUS)

FINAL REPORT PRESENTATIONS

Every student will present a final report on a free selection topic related with the course. Professor will give all the indications for this activity and the possible formats of the deliverable with time enought.

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Intermediate Tests	25 %		During Session 7
Individual Work	25 %		During Session 15
Group Presentation	25 %		Presentation during session 9&10: IKEA (12.5%) and Best practices and Triple A during session 11&12 (12.5%)
Class Participation	25 %		5% attendance and 20% class participation

RE-SIT / RE-TAKE POLICY

Different learning and teaching methodologies will be used in order to give dynamism and a practical character to the subject.

The methodology includes business case study, articles, technical notes videos, latest news and Internet web-links. All this material will be mixed in order to ensure the appropriate process for the analysis and decision-making skills. Teamwork is essential in the process and every team will prepare a teamwork presentation and a teamwork activity STSCM at IKEA. Groups will be informed and will be given indications in advance in order to prepare their reports and presentations properly. There are also an intermediate test and a final report.

Attendance & Class Participation (25%):

- Attendance counts as 5% and class participation as 20%. Make sure to participate debating with your colleagues and creating a collaborative learning environment. Add value with your participation. It is very important to attend to all sessions and actively contribute with your opinions, decisions and solid arguments in an environment of respect. During the course professor will invite students to participate in some forums contributing to Class Participation.

Teamwork Activities (25%):

- IKEA Fieldwork (12,5%) During session 9&10 we shall do a teamwork activity about IKEA and every team will answer some challenges prepared by the professor related to sustainability. Professor will give all the indications to prepare this activity.
- Teamwork Presentation (12,5%):Teamwork presentations will take place during session 11&12, where every team will prepare only one presentation with the professor's indications.
- Groups configuration (number of groups and members of each group) will be established by Adjunct Professor before the starting of the course according to final number of students taking part of this course.

Intermediate Test (25%):

- During session 7: Professor will make available a midterm mock before this session, with the structure of the midterm and questions similar in difficulty so you can practice, and a document with the answer to self-check your answers to be prepared.

Final Report (25%):

- Each student will elaborate an individual final report about a chosen topic related with the subject for Session 15. The more important aspects for the evaluation of this individual report are: Relationship with the learning topics of the subject, multimedia material to illustrate your topic, application of the tools and frameworks studied, creativity and strucure of the presentation. Professor will provide students with all the indications to prepare this final individual activity.

BIBLIOGRAPHY
Recommended

- Nancy Bocken, Paavo Ritala, Laura Albareda, Robert Verburg. (2019). *Innovation for Sustainability: Business Transformations Towards a Better World.* Palgrave Macmillan. ISBN 9783319973852 (Printed)
- Balkan Cetinkaya, Christoph Tyssen, Graham Ewer, Richard Cuthbertson, and Thorsten Klaas-Wissing. (2011). *Sustainable Supply Chain Management: Practical Ideas for Moving Towards Best Practice.* Springer. ISBN 9783642120220 (Printed)
- Joëlle Morana. (2013). *Sustainable Supply Chain Management.* Wiley. ISBN 9781848215269 (Printed)

BEHAVIOR RULES

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TECHNOLOGY NEW VENTURES

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 TNV-NBA.1C.e.OPT.M.A

Area Entrepreneurship

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **IGNACIO LARRU MARTÍNEZ**

E-mail: ilarru@faculty.ie.edu

Professor IGNACIO LARRU MARTÍNEZ

Ignacio Larrú is a technology investment director at KFund a venture capital fund in Spain. A former investment banker Ignacio was head of Big Data projects at Ticketbis. His work involves advising companies on the design and implementation of information systems and statistical models for both descriptive and predictive analytics.Previously Ignacio has been the founder (and coder…) of a wide array of different start-ups ranging from online retailers to complex software in the civil sector. He started his career as an IT consultant with PricewaterhouseCoopers developing software applications for leading financial institutions.

Ignacio holds a Master of Telecommunications Engineering from Universidad Politécnica de Madrid and a Master in Business Administration from IESE business School.

ilarru@faculty.ie.edu

PREREQUISITES

There are no prerequisites to take this course

SUBJECT DESCRIPTION

Technology Entrepreneurship is one of the most praised and discussed yet vaguely defined topics in today's turbulent economic environment. What is a technology entrepreneurship? Who can be defined as a technology entrepreneur? How can technological innovations be transformed into viable business opportunities? Sheltered by its polyhedral nature a wide array of different schools of thought for technology entrepreneurship have blossomed, each of them focusing on a particular side of this elusive topic. In this course we will examine the established knowledge base for technology entrepreneurship identifying the entrepreneurial mindset and process trying to distinguish art from science. We will be examining technological entrepreneurship as a process of innovation and value creation, rather than the single event of opening a business or writing a business plan. In our course we will navigate through the entrepreneurial journey from the initial opportunity recognition and assessment to the final business scaling reflecting on important aspects like innovation management, disruptive technologies or web and app development processes. We will focus our attention in the development of web and mobile app and startups and the challenges faced by entrepreneurs in these areas from the initial conception to the implementation of its idea.

LEARNING OBJECTIVES

Understanding innovation cycles and the creation of disruption technologies

- Be better able to recognize entrepreneurial opportunities based on these disruptive technologies
- Be able to translate the initial idea into an action plan to test it and implement it
- Learn the basics of achieving scalable growth in a technology startup
- Gain understanding of the implementation processes of the most relevant technologies in order to lead ventures based on them

TEACHING METHODOLOGY

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. Professor's main role is to lead and guide students to achieve the learning objectives of the course. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10.0 hours
Discussions	26.67 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	13.33 %	10.0 hours
Group work	33.33 %	25.0 hours
Individual studying	13.33 %	10.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Why technology entrepreneurship is different?. Introduction to the course and basic concepts on the new business models for technology entrepreneurs

SESSION 2 (LIVE IN-PERSON)

Introduction to the business model canvas for technology ventures. In this session we will review the Lean Canvas as the first step in the development of a new venture.

SESSION 3 (LIVE IN-PERSON)

In these two sessions you will have, together with your group, to think of your idea for the course and develop the lean canvas and business hypotheses for your idea based on the content from the previous sessions

SESSION 4 (LIVE IN-PERSON)

In these two sessions you will have, together with your group, to think of your idea for the course and develop the lean canvas and business hypotheses for your idea based on the content from the previous sessions

SESSION 5 (LIVE IN-PERSON)

Customer Discovery – Test the problem

As an entrepreneur it is very important for you to focus on real customer pains. In this session we will learn how to conduct customer interviews in order to extract the maximum insight from them. Additionally we will set up our smoke test landing page for our ideas.

Practical Case: Suzuka Aquajets (s-c)

SESSION 6 (LIVE IN-PERSON)

Customer Discovery – Test the solution

Incremental implementation is key for successful technological innovations. In this session we will learn how to build our company taking user's feedback into consideration through an incremental prototype from Minimum Viable Product to Beta testing

SESSION 7 (LIVE IN-PERSON)

Customer Discovery – Test the solution

Incremental implementation is key for successful technological innovations. In this session we will learn how to build our company taking user's feedback into consideration through an incremental prototype from Minimum Viable Product to Beta testing

Practical Case: Pick and click (s-c)

SESSION 8 (LIVE IN-PERSON)

In these sessions you will work with your group on the customer interview questionnaire and your landing page for the MVP of your idea.

SESSION 9 (LIVE IN-PERSON)

In these sessions you will work with your group on the customer interview questionnaire and your landing page for the MVP of your idea.

SESSION 10 (LIVE IN-PERSON)

In these sessions we will start thining about growth for our ventures. We will review the main growth loops (viral, paid and content based) and how they fit with the different products and business models

SESSION 11 (LIVE IN-PERSON)

In these sessions we will start thining about growth for our ventures. We will review the main growth loops (viral, paid and content based) and how they fit with the different products and business models

SESSION 12 (LIVE IN-PERSON)

In these sessions we will start thining about growth for our ventures. We will review the main growth loops (viral, paid and content based) and how they fit with the different products and business models

SESSION 13 (LIVE IN-PERSON)

Entrepreneurial finance: From bootstrapping to Venture Capital

In this session we will review and analyze the main characteristics of the different financing sources for entrepreneurs

Practical Case: Deluxe Capital (s-c)

SESSION 14 (LIVE IN-PERSON)

In this session you and your team will prepare the final presentation that you will presnet in front of the class during the session 15.

SESSION 15 (LIVE IN-PERSON)

In these sessions we will review the contents of the course using each team's presentation as an anchor for discussion

EVALUATION CRITERIA

Your final grade in the course will be based on both group deliverables and the final presentation that will be weighted in the following way:

criteria	percentage	Learning Objectives	Comments

Workgroups	30 %		Deliverables for each group during course
Group Presentation	50 %		Final group presentation
Class Participation	20 %		

RE-SIT / RE-TAKE POLICY
A. CLASS PARTICIPATION

Three main criteria will be used in reaching judgment about your class participation:

- <u>Depth and Quality of Contribution:</u> The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

- <u>Moving Your Peers' Understanding Forward:</u> Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

- <u>Frequency:</u> Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks.   However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

B. WORKGROUPS

During the course you will work with your group to deliver materials that will help you advance in your understanding of your market, business model and idea.

C. GROUP FINAL PRESENTATION

In the last session of the course you will need to present your findings regarding your idea in front of your classmates. The presentation will have the format of an investor's pitch with a following Q&A section.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

Regarding to the newly implemented ´liquid learning´ model, all students must still abide by the same IEU attendance policy, including those students who are connecting remotely to class sessions and not physically in the classroom because they are unable to be physically in Spain, on campus. During the sessions, students connecting remotely are required to fully connect their camera and microphone at all times, and must actively participate during the sessions (using all necessary audiovisual equipment), just as their fellow peers who are physically present in the classroom on campus.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).
- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)
- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.
- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

- Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.
- In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

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ETHICAL POLICY

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THE ART OF SELLING

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 TAOS-NBA.1C.m.OPT.M.A
Area Marketing and Communication
Number of sessions: 15
Academic year: 23-24
Degree course: 3º/4º
Number of credits: 3.0
Semester:
Category: OPTIONAL
Language: English

Professor: **MARINA TIRADO TEWES**

E-mail: mtirado@faculty.ie.edu

Marina Tirado is a global thought leader – professor, speaker, chief curiosity officer, ceramist, business strategy specialist – whose career is forged in the frontier between business strategy, sales, leadership, creativity, and education.

She is passionate about helping individuals and organizations reach their full potential by focusing on their innate capabilities. Marina is an advocate for purpose-driven leadership and enthusiastic about how individuals display and expand their innate talents and potential.

She assists both individuals and organizations who wish to gain a different perspective in this era of unusual business. It is an era that calls for virtuous and courageous individuals to lead human enterprises forward, generating a positive impact in our world, our workplace, and our communities.

She teaches this course with a waste experience in sales, having managed sales forces of over 100 people in more than 30 different countries.

Marina is also an avid pottery and art instructor.

Academic credentials:

- Executive Master in Positive Leadership and Strategy. IE Business School, Spain.
- Master in e-Business. IE Business School, Spain.
- Bachelor of Science Degree in Business Administration. Fordham University, New York City.
- Certified Coach and NLP Specialist
    Office hours will be on request. Please contact me at mtirado@faculty.ie.edu

PREREQUISITES

To sell is human. If you are human, you have innate sales capacities. The only pre-requesite for this program is to be human.

SUBJECT DESCRIPTION

"Human beings have an innate inner drive to be autonomous, self-determined, and connected to one another. And when that drive is liberated, people achieve more and live richer lives." -Daniel Pink

One out of every nine workers worldwide works in sales. Each day people earn their living by helping someone make a purchase. They are real estate brokers, consultants, retailers, executives, bartenders, industrial sales representatives, among many others. They sell trains to governments, digital transformation projects to organizations, food to wholesalers, and cars to prospective drivers at dealerships across the world.

Sales remains the second-largest occupational category in the world and even with the explosion of the Internet, broadband, smartphones, and e-commerce, the number of sales professionals has, against all odds, increased steadily over the past years.

As all other talents and skills honed over time, selling is a true art form that takes mastery to conquer and creativity to shape. It is also a life skill and a lot of fun.

In the corporate world, the sales departments within organizations are crucial for continues success and growth. The commercial function of an organization is where the execution of the marketing strategy is materialized. Its effectiveness has a direct and profound impact on the competitiveness of organizations, rendering the commercial department as the "voice of the customers".

Sales and Business Development executive are also the first ones to identify change in disruption in the industry, pushing their organizations to innovate constantly.

An honest and direct dialogue between an organization and its customers sets a flourishing ground for innovation, new products and services, and business opportunities.

The purpose of this journey we take together in this course is to dive into the importance of sales and business development departments within an organization and at the same time develop your own efficient and effective art of selling skills.

What you will gain from our time together is a deep dive into this fascinating discipline that will provide you with a wider strategical business perspective and self-awareness about your own selling skills. By far, the best way to influence people is to understand the true nature of our human experience.

"100% of employees are human. 100% of customers are human. You either know about human, or you do not know about business."

Simon Sinek.

LEARNING OBJECTIVES

In this program, we will focus on both your own selling skills, how to manage a sales department, as well as the overall strategical role of the sales and commercial departments within organizations. The program objectives include:

- A deep look into your own mastery of selling.
- A deep understanding of the human experience.
- Comprehend the role of the sales and business development departments.
- Grasp the different structures of sales forces within organizations.
- View the change drivers that are disrupting different infustries.
- Build bridges between customers, distribution channels, products, and services.
- Become aware of the challenges of creating, managing, and motivating a sales force.
- Gain deep knowledge about how to build strong customer relationships through and open and honest dialogue.
- Design effective and smart channel and customer strategies.
- Understand customer strategies and needs.

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15.0 hours
Discussions	20.0 %	15.0 hours
Exercises in class, Asynchronous sessions, Field Work	20.0 %	15.0 hours
Group work	20.0 %	15.0 hours
Individual studying	20.0 %	15.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

his course consists of four parts:

Part 1: The first part of the program focuses on gaining mastery in selling.

Part 2: The second part will deep dive into the current business context and the strategic importance of the sales departments within organizations and how to design effective channel and retail strategies.

Part 3: The third part focuses on how to build lasting and flourishing relationships with customers and ecosystems and how to manage sales teams.

Part 4: Finally, the fourth part will provide an idea of the techniques for identifying and understanding business opportunities.
Materials included in the syllabus
Introducing the Art of Selling:

Overview of the program:

- Introduction of key concepts and elements
- Program content and assignments

SESSION 2 (LIVE IN-PERSON)

Introducing the Art of Selling

- What is sales
- Ethics in sales
- Old and new forms of selling
- Building credibility, trust, and integrity

SESSION 3 (LIVE IN-PERSON)

Global and Effective Sales Skills.

What makes a great sales person?
What can we learn for great sales executive?
How do we establish a good human connection?
What are the interferences in the sales process?

SESSION 4 (LIVE IN-PERSON)

Global and Effective Sales Skills.

Communication and body language in the sales process
Negotation skills in the sales process

SESSION 5 (LIVE IN-PERSON)

Getting into Action.

Customer Journey mapping. Pain and Delight Points
Target audiences
Happy Customers Everywhere. Channels and Emotions.
How to create customer wow moments.
Pleasure Meaning and Engagement

Practice: On the field Experience Retail Tour

Students will visit the stores of retail brands to assess whether (and how) they create positive experiences. They will present the winners and make suggestions for improving those retail brands that fall short of an optimal customer experience.

SESSION 6 (LIVE IN-PERSON)

Future Lab. How to create a bettwer vision and strategy for future growth.

The future is no longer an extrapolation of the past, it is volatile and unpredictable. And growth is no longer steady or assured. This requires new strategic and sales thinking. In the next 3 sessions we will focus on the following:

Vision Canvas … how to define a better future
Growth Canvas … how to find the best opportunities
Disruption Canvas … how to change the game
Strategy Canvas … how to choose your priorities

SESSION 7 (LIVE IN-PERSON)

Vision and Growth Lab

Understanding change and growth vectors in different industries and setting the correct Sales Strategies

SESSION 8 (LIVE IN-PERSON)

Disruption and Strategy Lab.

Understanding disruption different industries and setting the best Sales strategies.

SESSION 9 (LIVE IN-PERSON)

Sales Management

- Structuring the Sales Force for Customer and Company Success

- Sales Force?Generated Marketing Intelligence
- Management of a Contracted Sales Force
- Incentive Systems
- Sizing the Sales Force and Designing Sales Territories for Results
- Training and Motivation of Sales Force

SESSION 10 (LIVE IN-PERSON)

Sales Management in B2B, B2C and B2G

Structuring the Sales Force for Customer and Company Success
Sales Force?Generated Marketing Intelligence
Management of a Contracted Sales Force
Incentive Systems
Sizing the Sales Force and Designing Sales Territories for Results
Training and Motivation of Sales Force

SESSION 11 (LIVE IN-PERSON)

The Sales Force and the Customer

Salespeople's Influence an Consumers' and Business Buyers' Goals and Wellbeing
Sales Technology
Customer Selection to Acquire, Retain, and Grow
Customer Relationship Management and the Sales Force
The Use of Organizational Climate in Sales Force Research

SESSION 12 (LIVE IN-PERSON)

The Organization and Sales Networks

Aligning the brand vision, business objectives with sales objectives
The Strategic Role of the Selling Function
Sales Force Agility, Strategic Thinking, and Value Propositions

SESSION 13 (LIVE IN-PERSON)

Effective Sales Force Management

SESSION 14 (LIVE IN-PERSON)

The Moment of Truth. Raising the standards and closing the deal.

Sustainable Business Growth
Innovation and Creativity in the Sales Process
Negotation Skills

SESSION 15 (LIVE IN-PERSON)

Final Exam

EVALUATION CRITERIA

CLASS PARTICIPATION (Face-to-Face and Online)

Three main criteria will be used in reaching judgment about your class participation:

Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high-quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high-quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks.   However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

INDIVIDUAL WORK

We will view the content of the individual projects in the first session of class.

GROUP FIELD WORK

You will be visiting retail stores and observe the different elements of their shopper propositions and strategy. You will give a report and a presentation to the class. This work will teach you to use objective indicators and public sources of information to better understand your customers, their objectives and needs. You will be asked to think about possible strategies that fit best with that particular customer.

FINAL GROUP PRESENTATION

You will have to prepare a final work where you will apply your learnings from the course. Two possibilities are given: taking a company / product of your choice, you will propose a channel strategy and the corresponding design of the sales organization to serve it, or you will propose a strategic customer segmentation.

FINAL EXAM

All students will make a final exam to check they have taken the basic concepts and learnings covered throughout the course.

criteria	percentage	Learning Objectives	Comments
Final Exam	25 %		
Individual work	25 %		
Group Work	25 %		
Class Participation	25 %		

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

 - To Sell is Human. *Daniel Pink.* Penguin. ISBN 1594631905 (Digital)

 - Jamie Smart. *Clarity: Clear Mind, Better Performance, Bigger Results.* Capstone. ISBN 0857089366 (Digital)

BEHAVIOR RULES

Please, check the University's Code of Conduct here. The Program Director may provide further indications.

ATTENDANCE POLICY

Please, check the University's Attendance Policy here. The Program Director may provide further indications.

ETHICAL POLICY

Please, check the University's Ethics Code [here](#). The Program Director may provide further indications.

19th June 2023

UNPLUGGED THE MARKETING WORKSHOP

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 UTM-NBA.1C.m.OPT.M.A

Area Marketing and Communication

Number of sessions: 15

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 3.0

Semester:

Category: OPTIONAL

Language: English

Professor: **EMILIO LLITERAS ARAÑÓ**

E-mail: elliteras@faculty.ie.edu

Academic Background

- ICADE E-3 – Universidad Pontificia de Comillas
- Degree in Law and Business Administration- Oct 1996/June 2002
- IE Business School – Senior Management Program 2014

Corporate Experience

- 22 years of professional experience. Balanced multifunctional experience in Marketing, Trade Marketing and Sales. Member of Iberia Leadership team. Knowledge of diverse Food categories, Home and Personal Care categories, Tobacco Industry and Pharma; as well as different Retail Channels (Hyper, Super) and exclusive Spanish Tobacco/Pharma channels
- Director General UTECA Since Oct 2019
- Freelance Since Oct 2017
- IE Professor and Advisor since 2011
- Unit Head OTC Spain Sandoz– April 2014- Sept 2017
- Head of Business Development Iberia and Gibraltar Country Manager. British American Tobacco – February 2011- Nov 2013
- Category Manager Cheese Iberia (Philadelphia, El Caserio). Kraft Foods Spain – Oct 2006 – February 2011
- Brand Manager Spain (Timotei, Sunsilk). Unilever Spain - August 2002 – September 2006
- Research Executive (Sony Professionals). Sony Spain – Nov 2001 – March 2002
    E-mail: elliteras@faculty.ie.edu
    Mobile: 600 535 407 (whatsapp)

PREREQUISITES

Students must take a minimum of 3 more subjects of the Marketing track during the Semester/Year, to be able to study this Course.

SUBJECT DESCRIPTION

Marketing is into our daily life, is part of current society's DNA. From a learning perspective the theoretical part of marketing is relatively easy to understand, the beauty of marketing is to make the complete journey until you have your proposal in the consumers´ hands. In marketing there is no right or wrong, is the consumer who decides which strategy was successful and which was an absolute failure. Analysis, consumer understanding, patience, common sense and coherence are the base to have a strong marketing strategy.

Unplugged the Marketing Workshop is the space to put in practice your marketing knowledge, to develop a strong business plan covering all the marketing elements (5P: Product, Price, Place, Promotion and People), to share and learn from others perspectives.

You will experience the challenges marketers face in the day to day of a multinational company, you will feel the real life of a marketing team (innovation, analysis, doubts, decision making…)

In a nutshell, put in practice your marketing knowledge by learning by doing.

LEARNING OBJECTIVES

This course will provide the student the following knowledge and skills:
- Experience daily real live of a marketing department in a multinational company.
- Put in practice your marketing knowledge.
- Marketing Mix understanding: analysis on needs and proposal of plans.
- Global vision of a marketing plan: Strategic plan development.
- Team work benefits and challenges.

TEACHING METHODOLOGY

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	6.67 %	5.0 hours
Discussions	26.67 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	26.67 %	20.0 hours
Group work	26.67 %	20.0 hours
Individual studying	13.33 %	10.0 hours
TOTAL	100.0 %	75.0 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Welcome & introductions. Discussion of the program, expectations and evaluation system

Real time Session

Introduction: Marketing Mix

Team groups definition

Objective: Set the scene of the workshop, understand the needs

SESSION 2 (LIVE IN-PERSON)

Welcome & introductions. Discussion of the program, expectations and evaluation system

Real time Session

Introduction: Marketing Mix

Team groups definition

Objective: Set the scene of the workshop, understand the needs

SESSION 3 (LIVE IN-PERSON)

Case Study Debrief

Real time Session

Case sharing

Objective: Share and clarify doubts on case data; Learn from others experience

SESSION 4 (LIVE IN-PERSON)

Case Study Debrief

Case sharing

Objective: Share and clarify doubts on case data; Learn from others experience

SESSION 5 (LIVE IN-PERSON)

Case Study Debrief

Real time Session

Case sharing

Objective: Share and clarify doubts on case data; Learn from others experience

SESSION 6 (LIVE IN-PERSON)

Client Brief

Real time Session

Group work session: Live session

Objective: Understand the Brand reality + client needs

Group work session: Live Session; Brand Key Build up

Objective: Generate the space for Team discussion and Professor Assessment/Guidance

SESSION 7 (LIVE IN-PERSON)

Class Discussion

Doubts sharing

Objective: Share and clarify doubts; Learn from others experience

SESSION 8 (ASYNCHRONOUS)

Group work session: Live Session; Brand Key Build up
Objective: Generate the space for Team discussion and Professor Assessment/Guidance
Elevator Pitch

SESSION 9 (LIVE IN-PERSON)

Group work session: Live Session. Marketing Plan Build up
Elevator Pitch Feedback
Objective: Generate the space for Team discussion and Professor Assessment/Guidance

SESSION 10 (ASYNCHRONOUS)

Group work session: Live Session. Marketing Plan Build up
Objective: Generate the space for Team discussion and Professor Assessment/Guidance

SESSION 11 (LIVE IN-PERSON)

Group work session: Live Session. Marketing Plan Build up
Objective: Generate the space for Team discussion and Professor Assessment/Guidance

SESSION 12 (ASYNCHRONOUS)

Group work session: Live Session. Marketing Plan Build up
Objective: Generate the space for Team discussion and Professor Assessment/Guidance

SESSION 13 (LIVE IN-PERSON)

Group work session: Live Session. Marketing Plan Build up
Objective: Generate the space for Team discussion and Professor Assessment/Guidance

SESSION 14 (LIVE IN-PERSON)

Board Team Presentation: Case study resolution Presentation
Materials: Final Report + Group Presentation
Objective: External evaluation of each group Case resolution

SESSION 15 (LIVE IN-PERSON)

Board Team Presentation: Case study resolution Presentation
Materials: Final Report + Group Presentation
Objective: External evaluation of each group Case resolution

EVALUATION CRITERIA

criteria	percentage	Learning Objectives	Comments
Case Studies	30 %		
Individual Contribution to GP	20 %		
Final Group Presentation (Client)	40 %		
Class Participation	10 %		

RE-SIT / RE-TAKE POLICY

Your final grade in the course will be based on both individual and group work of different characteristics that will be weighted in the following way:

A. CLASS PARTICIPATION

Three main criteria will be used in reaching judgment about your class participation:

- Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.

- Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

- Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

B. CASE STUDY WRITE-UPS

Each student must complete individually the 3 cases write-ups. For each write-up, there is an upper limit of two pages of text (assuming 11-point font size, Times New Roman)

A soft copy of the document must be delivered to the professor in class before the case discussion begins (uploaded on campus-ie).

Make sure the case write-up is easy to read. Consider using bullets, headings, etc., to make the case write-up easy to follow.

The objective of this process it to give you practice writing concise executive summaries – something that would make the reader believe that you have done a thorough analysis supporting your recommendations. This is the type of briefing that must typically be prepared for upper management – before they provide the resources for a more detailed investigation.

Good case briefs are concise, but also provide a fact-based rationale for your recommendations and implementation plan. The rationale should reflect a good understanding of the important issues of the case and may integrate previous material from the class or your experience. You might also note factors that argue against your recommendation, and how your implementation plan might minimize the impact of these factors.

C. FINAL GROUP PRESENTATION AND REPORT – Marketing Jury-

You are expected to complete a final project with your group and present it in written form. Each Group must present two documents: Final Report (deep written explanation of the decision taken, strategy and marketing plans. Max 25 pages); Strategic Presentation (Oral presentation of max. 25minutes including Q&A- that will depend on the final number of groups)

 You also have to send a soft copy of the case write-up to the professor via email one hour before presenting.

This evaluation will be done by a marketing external jury based on these criteria: Strategy, Plan Consistency, innovation, execution, Presentation and plan viability. The average between the individual marks of the jury will be the one reflected in this section

Peer evaluation: no free riders will be accepted. Peer evaluation must be completed, is compulsory. In case an alumni does not complete the peer evaluation form this part will be graded as 0.

D. FINAL PRESENTATION AND REPORT INDIVIDUAL – Professor-

Individual contribution to team development, group work, individual presentation skills and final presentation and report.

You are expected to complete a final project with your group and work as a team, building ideas together, being constructive and a real team player. Individual presentation skills and clarity during Presentation and Q&A will be taken into account.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: one (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June / July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.)

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

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> ! Students **failing more than 18 ECTS credits** after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

> ! In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BEHAVIOR RULES

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ATTENDANCE POLICY

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ETHICAL POLICY

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VENTURE CREATION AND PLANNING 2.0

Grado en Administración de Empresas / Bachelor in Business Administration BBA SEP-2023 VECP-NBA.1C.e.OPT.M.A

Area Entrepreneurship

Number of sessions: 30

Academic year: 23-24

Degree course: 3º/4º

Number of credits: 6.0

Semester:

Category: OPTIONAL

Language: English

Professor: **MARCOS EGUILLOR FERNANDEZ**

E-mail: meguillor@faculty.ie.edu

Senior digital business executive & entrepreneur. Investor, advisor and director.

Innovation | Transformation | Digital | Optimist.

Marcos has worked in the digital arena since 1999, in the Internet, telco, mobile devices, apps, software, Internet of Things, media and broadcast, videogames, esports, social media and content, gamification, elearning, crisis communication, education, events and consulting verticals, among others.

He has played international leading roles in innovation, digital transformation, product/services design, development and standardisation. He has also got leading responsibilities in corporate and business development and project management.

He is a serial entrepreneur, investor, mentor, advisor and director in multiple ventures. He is a cofounder and head of revenue of vidiv, online platform for mass events, and MAD Lions esports club (acquired by the Canadian OverActive Media group). Also, a co-founder and president of Barbara IoT, a deep tech company with a focus on IoT and cybersecurity. Further, founder of the Innovation as a Service resultancy firm BinaryKnowledge_, and cofounder of IdeaFoster, innovation agency acquired by the Peruvian company Canvia.

Marcos is a member of the Spanish Institute of Directors-Administrators (IC-A). He has worked in international organizations, being a member of the board of the Open Mobile Alliance (OMA) on behalf of the Telefónica Group, a member of the Spanish Association of Telecommunications Engineers (COIT-AEIT) and a representative member before the Spanish Engineering Institute (IIE). In addition, he has been a member of the committee and vice-president of the Spanish Red Cross in Madrid, a member of the advisory board of the IMAN Foundation or a member of the Internet of Things Council.

He is an independent consultant and evaluator of FP7 and Horizon2020 calls of the European Commission.

As an educator and speaker, he is an adjunct professor at IE Business School, Headspring (joint-venture with Financial Times that delivers in-company programs) and other institutions. Furthermore, he has also extensively collaborated in hackathons, incubation and acceleration programs of many organizations.

He holds an MSc. in Telecommunication Engineering and an Executive MBA. He is a candidate PhD and Project Management Professional certified. Marcos received a Torres Quevedo grant as a researcher by the Ministry of Innovation and Science of Spain from 2010 to 2012. And he was awarded with Telefónica I+D Prize for Innovation in 1999 and recognized for excellence as professor and mentor at IE Business School and University several times.

meguillor@faculty.ie.edu

PREREQUISITES

You should have already acquired some basic knowledge about business, financial, marketing, operations, innovation, management and talent practices.

In addition, you should have already been exposed to the basics of entrepreneurship (why, how and what) and the concepts, methodologies and tools related to Lean Startup, Customer Development and Design Thinking.

REQUIREMENTS

- Work and effort. Participation, commitment, passion, energy, curiosity, acceptance of failure and perseverance.

- Self-criticism, push, open-mindedness, empathy and assertiveness.
    Finally, the most essential requirement is to talk business.

SUBJECT DESCRIPTION

This course is not about theory but practice; it is a DIY entrepreneurial experience that takes your ideas and helps validate your hypotheses by making the Value Proposition tangible to your customers.

A good reason for joining the course could be having a great project, wanting to become an entrepreneur or just curiosity. Even when you were not interested in entrepreneuring, going through the course will provide you with experiences and skills that are very demanded by companies nowadays. They no longer want followers but innovators able to devise, create, scale and steer profitable and sustainable ventures over time in rapidly changing markets with increasingly demanding customers.

You have a unique opportunity to do something different, to do something special. This course will add an invaluable reality check to your path throughout the degree.

It is structured as a journey starting with the identification of a business idea, followed by its assessment and development into a potentially viable Business Opportunity, and ends with the presentation of a professional investor-ready pitch.

NOTE: This course is not a light one. It asks for a lot of work and commitment from you. You will have to deliver assignments. You will have to engage with (real) potential customers, providers and partners. You will have to present your intermediate and final results to the group and get feedback. You will have to challenge others' ideas. And you will be challenged.

LEARNING OBJECTIVES

The course's main objective is to allow you to apply the tools learnt in previous entrepreneurship courses to a Business Opportunity that may eventually evolve into a real business.

This journey will also allow you to experience first-hand the uncertainty, pressure, excitement, and related sensations typically surrounding creating a new business. You will meet the following objectives, among others, throughout the journey:

- The formation of an entrepreneurial team.
- The creation of a business idea.
- The transformation of your idea into a Business Opportunity.
- The application of the Lean Startup and Customer Development methodologies (focusing on the Customer Discovery and Customer Validation phases) to your own project.
- The creation and application of Non-Functional and Functional Minimum Viable Products to test hypotheses and extract learning for decision-making, adjustment, iteration, improvement, evolution and pivoting of your opportunity.
- The definition of a Go-to-Market Strategy for help you achieve the Product Market Fit phase.
- The preparation of a solid Executive Summary and investor-ready Pitch of your Business Opportunity.

TEACHING METHODOLOGY

If the best way to learn is by doing, the best way to learn how to become an entrepreneur is by entrepreneuring.

This is not intended to be a subject but a 100% hands-on course that uses the case method, where the case is your project.

The theory is not part of the course; you should know it. And if it is not the case, it should be ok anyway because one of the main characteristics of entrepreneurs is that they are self-taught and do whatever to reach the objective.

Ideally, the end result of the process is to become an entrepreneur, creating value from all the ideas, knowledge, skills, network and experience you have acquired throughout the process. It is a mini-incubation period.

You will create a project in workgroups. And you will have to agree on what will be the idea you as a team will develop.

You can change the idea or project along the course, but not the group. Being an entrepreneur entails having co-founders and a team. It is one of the keys to success with a project, and therefore, it should be part of the experience of the course.

The course is designed following the principles of Flipped Learning. Thus, you should prepare for the sessions in advance; watch proposed videos or go through quick reads. You will also usually need to deliver short assignments before some sessions. In addition, you should be ready to share your progress with the rest of the participants at any moment as an excuse for discussion in the group.

Sessions will include reviewing the projects, finding answers, sharing tips about methodologies and tools, co-creating ideas and solutions to problems or areas of improvement, debates, etc.

We will use commercially available tools (most or all of them free) to identify, measure, analyse, conclude, develop and improve the projects.

Finally, there are no right or wrong answers, just different views and alternatives for a way forward. Be brave to share them and get criticised while respecting and supporting others. Do so in a constructive but brutally honest manner.

NOTE: All course participants implicitly agree that by participating, all the information related to their projects can be used for academic and learning purposes. This should be fine to any entrepreneur, as the differentiating factor is not the idea but the execution.

FEEDBACK: You can expect the professor's feedback about your ideas, projects, assignments and progress during sessions. If you have doubts, ask. Make it happen; it's your responsibility.

IE University teaching method is defined by its collaborative, active, and applied nature. Students actively participate in the whole process to build their knowledge and sharpen their skills. The professor's main role is to lead and guide students to achieve the course's learning objectives. This is done by engaging in a diverse range of teaching techniques and different types of learning activities such as the following:

Learning Activity	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	6.67 %	10.0 hours
Discussions	13.33 %	20.0 hours
Exercises in class, Asynchronous sessions, Field Work	3.33 %	5.0 hours
Group work	66.67 %	100.0 hours
Individual studying	10.0 %	15.0 hours
TOTAL	100.0 %	150.0 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

INTRODUCTION

Objectives:

- Introduce the course: Objectives, methodology, requirements, rules and evaluation criteria. Set expectations.
- Welcome talent and know about their objectives, interests, skills and mindset.
- Get ready for the sessions:

Read the syllabus.

- Watch: Start with why - how great leaders inspire action | Simon Sinek | TEDxPugetSound.
  http://www.youtube.com/watch?v=u4ZoJKF_VuA
- Watch: Guy Kawasaki "The Art of the Start" @ TiECon 2006.
  http://www.youtube.com/watch?v=jSlwuafyUUo
- Prepare your questions.

During the sessions:

- Introduce the course.
- Review the syllabus.
- Q&A and feedback.

After the sessions:

- -

Assignments:

- -

SESSIONS 3 - 4 (LIVE IN-PERSON)

IDEATION WORKSHOP

Objectives:

- Help teams ideate and explore ideas for your projects.

Get ready for the sessions:

- Research on market and industry trends.
- Think of potential global and scalable business opportunities.
- Prepare your questions.

During the sessions:

- Identify and explore territories of ideas that could be good business opportunities and fit the cofounders.
- Plant the seed of team projects.
- Q&A and feedback.

After the sessions:

- Agree on an idea.
- Work on the assignment. It will be your project for the rest of the course.
- Get ready to pitch your project.

Assignments:

- Tweetpitch. Deliver it before the Tweetpitch and Business Opportunity Workshop. Not graded.

SESSIONS 5 - 6 (LIVE IN-PERSON)

TWEETPITCH AND BUSINESS OPPORTUNITY WORKSHOP

Objectives:

- Review ideas, provide feedback and help teams identify critical elements of their projects.
- Identify the Business Opportunity behind the ideas.
- Get approval for the projects.

Get ready for the sessions:

- Get ready to pitch with your team in front of the rest of the class.
- Prepare your questions.

During the sessions:

- Teams will present their Tweetpitch assignment and will get questions and feedback from the rest of the participants and the professor.
- Discuss how to characterize and measure the Business Opportunity.
- Q&A and feedback.

After the sessions:

- Consider and integrate the feedback.
- Define a work plan to execute the project.

Assignments:

- -

SESSIONS 7 - 8 (LIVE IN-PERSON)

MENTORING #1

Objectives:

- Provide individual team mentoring. Help the teams solve their main concerns.

Get ready for the sessions:

- Get ready to share the status of the project.
- Prepare questions and main concerns on specific topics related to your project.
- Book a workroom for your team for the spare time you are not with the professor.

During the sessions:

- The professor will have individual private conversations with each team to know how they are doing and the status of their projects, answer their questions, provide feedback and help move forward.
- While not with the professor, all the teams should continue working on their projects in separate working rooms they should book next to the class.
- Q&A and feedback.

After the sessions:

- Consider and integrate the feedback.

Assignments:

- -

SESSIONS 9 - 10 (LIVE IN-PERSON)

CUSTOMER AND PROBLEMS WORKSHOP

Objectives:

- Identify and characterize the customers to be targeted.
- Identify and analyse the stakeholders of the projects.
- Analyse the Problems, needs and jobs-to-be-done of the customers.

Get ready for the sessions:

- Check and prepare the references from the assignments.
- Prepare your questions.

During the sessions:

- Work on the Customer and the Problems of the teams.
- Work on the assignment.
- Q&A and feedback.

After the sessions:

- Finish the assignment.

Assignments:

- Customers, Stakeholders and Problems. Deliver it before the Customer and Problems
  Validation Workshop. Not graded (it should be part of the Final Pitch).

SESSIONS 11 - 12 (LIVE IN-PERSON)

CUSTOMER AND PROBLEMS VALIDATION WORKSHOP

Objectives:
- Start the validation of the Customers and their Problems.

Get ready for the sessions:
- Check and prepare the references from the assignments.
- Prepare your questions.

During the sessions:
- Work on validating the Customer and the Problems of the teams.
- Work on the assignment.
- Q&A and feedback.

After the sessions:
- Finish the assignment.

Assignments:
- Validation Plan. Deliver it before the Final Pitch Competition session. Graded as Proof of
  Validation.

SESSIONS 13 - 14 (LIVE IN-PERSON)

SOLUTION AND BUSINESS MODEL WORKSHOP

Objectives:
- Define a Solution to a customer's Problem.
- Define a Business Model to exploit the opportunity.

Get ready for the sessions:
- Check and prepare the references from the assignments.
- Prepare your questions.

During the sessions:
- Work on the Solution and the Business Model of the teams.
- Work on the assignments.
- Q&A and feedback.

After the sessions:
- Work on the assignments.

Assignments:
- Solution. Deliver it before the Mentoring #2 session. Not graded (it should be part of the Final
  Pitch).
- Business Model. Deliver it before the Mentoring #2 session. Not graded (it should be part of the
  Final Pitch).
- Video Explainer. Deliver it before the Mentoring #2 session. Graded as Non-Functional MVP.
- Landing Page. Deliver it before the Mentoring #2 session. Graded as Non-Functional MVP.

SESSIONS 15 - 16 (LIVE IN-PERSON)

SOLUTION AND BUSINESS MODEL VALIDATION WORKSHOP

Objectives:

- Start with the validation of the Solution and the Business Model.

Get ready for the sessions:

- Check and prepare the references from the assignments.
- Prepare your questions.

During the sessions:

- Work on validating the Solution and the Business Model of the teams.
- Work on the assignment.
- Q&A and feedback.

After the session:

- Work on the assignment.

Assignments:

- Functional MVP. Deliver it before the Final Pitch Competition session. Graded.

SESSIONS 17 - 18 (LIVE IN-PERSON)

MENTORING #2

Objectives:

- Provide individual team mentoring. Help the teams solve their main concerns.

Get ready for the sessions:

- Get ready to share the status of the project.
- Prepare questions and main concerns on specific topics related to your project.
- Book a workroom for your team for the spare time you are not with the professor.

During the sessions:

- The professor will have individual private conversations with each team to know how they are doing and the status of their projects, answer their questions, provide feedback and help move forward.
- While not with the professor, all the teams should continue working on their projects in separate working rooms they should book next to the class.
- Q&A and feedback.

After the sessions:

- Consider and integrate the feedback.

Assignments:

- -

SESSIONS 19 - 20 (LIVE IN-PERSON)

FROM PRE-SEED TO SEED STAGE GO-TO-MARKET STRATEGY WORKSHOP

Objectives:

- Identify and define the critical elements to establish a go-to-market strategy that will allow the venture to land its first customers, get traction, and validate Product Market Fit.

Get ready for the sessions:

- Check and prepare the references from the assignments.
- Prepare your questions.

During the sessions:

- Work on the phasing, beachhead market, funnelling, marketing and sales of the teams.
- Work on the assignment.
- Q&A and feedback.

After the sessions:

- Finish the assignment.

Assignments:

- Go-to-Market Strategy. Deliver it before the Executive Summary and Final Pitch Workshop session. Not graded (it should be part of the Final Pitch).

SESSIONS 21 - 22 (LIVE IN-PERSON)

FINANCIALS, FUNDING, ESG AND RISKS WORKSHOP

Objectives:

- Identify the key financial variables of the projects and how to fund them.
- Define the key elements of the ESG dimensions of the project.
- Identify the key risks of the project.

Get ready for the sessions:

- Check and prepare the references from the assignments.
- Prepare your questions.

During the sessions:

- Work on the pre-seed financials, funding, ESG and risks of the teams.
- Work on the assignments.
- Q&A and feedback.

After the sessions:

- Work on the assignments.

Assignments:

- Financials and funding. Deliver it before the Final Pitch Competition session. Not graded (it should be part of the Final Pitch).
- ESG. Deliver it before the Final Pitch Competition session. Not graded (it should be part of the Final Pitch).
- Risks. Deliver it before the Final Pitch Competition session. Not graded (it should be part of the Final Pitch).

SESSIONS 23 - 24 (LIVE IN-PERSON)

MENTORING #3

Objectives:

- Provide individual team mentoring. Help the teams solve their main concerns.

Get ready for the sessions:

- Get ready to share the status of the project.
- Prepare questions and main concerns on specific topics related to your project.

- Book a workroom for your team for the spare time you are not with the professor.

During the sessions:

- The professor will have individual private conversations with each team to know how they are doing and the status of their projects, answer their questions, provide feedback and help move forward.
- While not with the professor, all the teams should continue working on their projects in separate working rooms they should book next to the class.
- Q&A and feedback.

After the sessions:

- Consider and integrate the feedback.

Assignments:

- -

SESSIONS 25 - 26 (LIVE IN-PERSON)

EXECUTIVE SUMMARY AND FINAL PITCH WORKSHOP

Objectives:

- Identify the key elements of the Executive Summary and Final Pitch of the project.

Get ready for the sessions:

- Check and prepare the references from the assignments.
- Prepare your questions.

During the sessions:

- Work on the Executive Summary and Final Pitch of the teams.
- Work on the assignments.
- Q&A and feedback.

After the sessions:

- Work on the assignments.

Assignments:

- Executive summary. Deliver it before the Final Pitch Competition session. Graded.
- Final Pitch. Deliver it before the Final Pitch Competition session. Graded.

SESSIONS 27 - 28 (LIVE IN-PERSON)

FINAL PITCH REHEARSAL

Objectives:

- Get ready for the Final Pitch of the project.

Get ready for the sessions:

- Prepare to pitch the project as in the final sessions.
- Prepare questions and main concerns on specific topics related to the Final Pitch of your project.
- Book a workroom for your team to rehearse.

During the sessions:

- The professor will have individual private sessions with each team to review their pitches (material + performance), answer their questions, provide feedback and help move fine-tune

their pitch.

- While not with the professor, all the teams should continue working on their projects and rehearsing in separate working rooms they should book next to the class.
- Q&A and feedback.

After the sessions:

- Consider and integrate the feedback.

Assignments:

- -

SESSIONS 29 - 30 (LIVE IN-PERSON)

FINAL PITCH COMPETITION

Objectives:

- Host teams pitching their projects, their MVPs (both Functional and Non-Functional) and sharing the results of their validation processes.
- Provide feedback.
- Extract main takeaways and learning of their projects and their entrepreneurial processes.
- Provide constructive criticism about the course and all its components and participants.
- Celebrate.

Get ready for the sessions:

- Get ready to pitch.
- Ensure you are delivering all the missing assignments appropriately.
- Rehearse.

During the sessions:

- Pitch the projects; business + validation + MPVs, both Functional and Non-Functional.
- Judge all the projects and choose a winner.
- Q&A and feedback.

After the sessions:

- Get free ;-)

Assignments:

- -

EVALUATION CRITERIA

You will be evaluated based on your results, the process you follow and your participation and contribution to the learning process of the whole group.

All assignments will be available in advance on the Online Campus. They will include instructions and additional references. It will be your exclusive responsibility to check if there are assignments available or if assignments have been appropriately delivered, registered and graded.

All assignments issued will help you moving forward along the process of transforming your idea into a Business Opportunity. We will also use them as basis for discussion during sessions. Late deliveries will be strongly penalized.

When you get feedback from my side about your assignment, it is intended to help you improve and move forward. You should not deliver it back again with modifications for my review. If you consider that my comments make sense and help you creating an improved version, good for you.

FINAL PITCH

Your Final Pitch will be graded. Template and instructions about the preparation and performance of the Pitch will be provided with sufficient time.

FUNCTIONAL MVP

It is a limited working version of your product or service that is useful for validation purposes. You will get specific requirements, instructions and references.

NON-FUNCTIONAL MVPs

They are non-working versions of your Value Proposition that are useful for validation purposes. You will get specific requirements, instructions and references.

EXECUTIVE SUMMARY

It is a short but comprehensive document of the project that shares the basics of the Business Opportunity behind the idea, and how it is made come true. You will get specific requirements, instructions and references.

PROOF OF VALIDATION

It is a short but comprehensive document of the project that introduces all the relevant information about the validation strategy, tactics, results, learning and decisions. You will get specific requirements, instructions and references.

PARTICIPATION AND CONTRIBUTION

Participation during live sessions and on the Online Campus will be graded. Attending and not participating does not give you any participation points.

You will be positively graded if you share your views, doubts, concerns, thoughts, findings, conclusions, results, learning, and experiences. It is not a one-shot effort but a continuum of involvement. We expect you to be reasonably open, talkative and proactive. You will get a poor grade if you barely participate, speak or write just for the sake of participating, copy, or spam the group.

Ask as much as needed; there are no 'silly' questions. If you have doubts about the course (e.g., dates, assignments, etc.) or administrative matters, please first check the syllabus, announcements and other instructions provided during the introductory session. Please, submit your questions to the corresponding threads on the Online Campus, so everyone can benefit from the answer. Do not submit questions via email.

For written participation, I recommend that you go straight to the point, be reasonable and succinct. If you refer to information or material available on the Internet, cite the source (share the link). Please, do not copy the content.

Three main criteria will be used to evaluate your participation (both in class and on the Online Campus): Frequency, Depth and Quality of contributions. Valuable comments are those that move the class forward.

PEER EVALUATION

All participants inside every team will evaluate each other.

The criteria should be to reward those who have contributed the most to your learning process and your team.

Instructions about the execution of the evaluation will be provided at the end of the course.

criteria	percentage	Learning Objectives	Comments
Peer evaluation	20 %		Responsibility: Individual. Evaluated by: Peers in the team.

Executive Summary	10 %		Responsibility: Team. Evaluated by: Professor.
Non-functional MVPs	10 %		Responsibility: Team. Evaluated by: Professor / Class.
Proof of validation	10 %		Responsibility: Team. Evaluated by: Professor.
Functional MVP	20 %		Responsibility: Team. Evaluated by: Professor / Class.
Final Pitch	20 %		Responsibility: Team. Evaluated by: Professor / Class
Participation and contribution	10 %		Responsibility: Team. Evaluated by: Professor.

RE-SIT / RE-TAKE POLICY

Each student has four (4) chances to pass any given course distributed over two (2) consecutive academic years. Each academic year consists of two calls: One (1) ordinary call (during the semester when the course is taking place); and one (1) extraordinary call (or "re-sit") in June/July.

Students who do not comply with the 70% attendance requirement in each subject during the semester will automatically fail both calls (ordinary and extraordinary) for that Academic Year and have to re-take the course (i.e., re-enroll) during the next Academic Year.

The Extraordinary Call Evaluation criteria will be subject to the following rules:

- Students failing the course in the ordinary call (during the semester) will have to re-sit evaluation for the course in June/July (except those students who do not comply with the attendance rule, and therefore will not have that opportunity, since they will fail both calls and must directly re-enroll in the course during the next Academic Year).

- It is not permitted to change the format nor the date of the extraordinary call exams or deadlines under any circumstance. All extraordinary call evaluation dates will be announced in advance and must be taken into consideration before planning the summer (e.g. internships, trips, holidays, etc.).

- The June/July re-sit will consist of a comprehensive evaluation of the course. Your final grade for the course will depend on the performance in this exam or evaluation only. I.e., continuous evaluation over the semester (e.g. Participation, quizzes, projects and/or other grade components over the semester) will not be taken into consideration on the extraordinary call. Students will have to achieve the minimum passing grade of 5 and the maximum grade will be capped at 8.0 (out of 10.0) – i.e., "notable" in the extraordinary call.

- Re-takers: Students who failed the subject on a previous Academic Year and are now re-enrolled as re-takers in a course will need to check the syllabus of the assigned professor, as well as contact the professor individually, regarding the specific evaluation criteria for them as re-takers in the course during that semester (ordinary call of that Academic Year). The maximum grade that may be obtained as a retaker during the ordinary call (i.e., the 3rd call) is 10.0 (out of 10.0).

After exams and other assessments are graded by the professor (on either the ordinary or extraordinary call), students will have a possibility to attend a review session (whether it be a final exam, a final project, or the final overall grade in a given course). Please be available to attend the session in order to clarify any concerns you might have regarding your grade. Your professor will inform you about the time and place of the review session.

Students failing more than 18 ECTS credits after the June/July re-sits will be asked to leave the Program. Please, make sure to prepare yourself well for the exams in order to pass your failed subjects.

In case you decide to skip the opportunity to re-sit for an exam or evaluation during the June/July extraordinary call, you will need to enroll in that course again for the next Academic Year as a re-taker, and pay the corresponding tuition fees. As you know, students have a total of four (4) allowed calls to pass a given subject or course, in order to remain in the program.

BIBLIOGRAPHY

Recommended

- Brant Cooper, Patrick Vlaskovits. *The Entrepreneur's guide to Customer Development. A "cheat sheet" to The Four Steps to the Epiphany.* Brant Cooper, Patrick Vlaskovits. ISBN 97809827436 (Digital)

USE OF ARTIFICIAL INTELLIGENCE

The course professor expects you to use AI extensively in a reasonable, responsible and ethical manner to boost your reasoning, skills, process and results.

AI is usually a good starting point to break the blank page syndrome, but not a just-take-it-as-it-is result. You should work hard to provide a good context and a reasonable prompt to kick off the process and then go through a few refine-and-check loops for better outcomes.

You will be responsible for any of the outcomes of the AI tools you use.

You should comply with the following:

1. Identify when and how you use them.
2. Identify what part of the materials directly results from the AI tools and what does not.
3. Cite the tools and references you have used.
4. Share the prompts.
5. Add value on top of it; your own criteria, reflection, test, and learning.
6. You should be able to explain and defend any outcome of the AI tools you use.

Failing to comply with these requirements could be considered plagiarism and, therefore, subject to failing the deliverable and an Ethics case.

BEHAVIOR RULES

Please, check the University's Code of Conduct [here](). The Program Director may provide further indications.

ATTENDANCE POLICY

Please, check the University's Attendance Policy [here](). The Program Director may provide further indications.

ETHICAL POLICY

Please, check the University's Ethics Code [here](). The Program Director may provide further indications.

ADVANCED NEGOTIATIONS AND PUBLIC ADVOCACY

IE University
Professor: **ADRIAN JOFRE BOSCH**

E-mail: ajofre@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 6.0
Language: English

PREREQUISITES

SUBJECT DESCRIPTION

The course will cover advanced topics in negotiation and public advocacy such as conflict analysis, cooperation and competition, power dynamics, mediation, multiculturalism, perception, framing, lobby, and polarization as they relate to theoretical and practical issues from the international perspective.

On a daily basis, we are involved in numerous negotiations. Some of these are simple and easy to resolve, while others are complex and may take place over several sessions (or even years and centuries). Some of our negotiations take place with one other person and others take place with several parties. In this course, we will explore negotiation from several points of view and approaches as listed below under the session headings. Broadly we will look at key orientations to conflict and negotiation; individual factors affecting the course of negotiation (eg, emotions, culture), group factors (eg, multiparty and intergroup dynamics), and interpersonal factors (communication, power).

The course will be a blend of concepts and skills, theory and practice. On some occasions, you will be introduced to a concept and then asked to apply those concepts in an experiential activity. At other times you will be asked to engage in an activity or simulation and then relevant concepts will be elicited based on your experience. You will have opportunities to practice developing your skills throughout the course, in terms of enhancing your practice and honing your analytical and conceptual understanding.

OBJECTIVES AND SKILLS

- To develop negotiation skills through the application of these foundational principles and experiential learning.
- To reflect critically on your own and other's perspectives of public advocacy.
- To enhance your understanding of the concepts, models and theories behind conflict resolution, problem-solving and social change practices and skills.

METHODOLOGY

The course will be a blend of concepts and skills, theory and practice. You will have opportunities to practice developing your skills throughout the course, in terms of enhancing your practice and honing your analytical and conceptual understanding.

The course will cover basic topics in conflict engagement such as cooperation and competition, power, culture, justice, negotiation and mediation, intergroup conflict, violence, intractable conflict, and sustainable peace as they relate to theoretical and practical issues of conflict management and resolution at the interpersonal, intergroup, organizational, community and international levels. It will emphasize the links between theory, research, and practice throughout.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	28.0 %	42 hours
Discussions	13.33 %	20 hours
Exercises	29.33 %	44 hours
Group work	21.33 %	32 hours
Other individual studying	8.0 %	12 hours
TOTAL	100.0 %	150 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Introduction, theories and framing

Article: The conflict resolution field (Ch.1) in "Peacemaking in International Conflict: Methods and Techniques" (ced)

Working Paper: Dispute Resolution (HLS)

Practical Case: Negotiation Preparation Worksheet (s-c)

- Conflict Basics: definitions, guiding principles, levels of conflict, the conflict dilemma, etc.
- Conflict Analysis Tools

SESSIONS 3 - 4 (LIVE IN-PERSON)

Nature and Context of Negotiation

Article: 3-D Negotiation: Playing the Whole Game (HBS R0311D-PDF-ENG)

Working Paper: Negotiation Skills (HLS)

Technical note: Reengineering Negotiations (MIT Sloan Management Review, Volume 39, Number 3, Spring 1998) (TCC SMR3936)

- Principals, characteristics of a negotiation situation, types of interdependence, etc.

SESSION 5 (ASYNCHRONOUS)

Competitive vs. cooperative negotiations

Book Chapters: Distributive Bargaining (ch.2) in "Essentials of Negotiation" (See Bibliography) (CED)

Book Chapters: Integrative Negotiation (Ch.3) in "Essentials of Negotiation" (See Bibliography)

- Online discussion forum

SESSIONS 6 - 7 (LIVE IN-PERSON)

Team Negotiations

Article: The Surprising Power of Questions (HBS R1803C-PDF-ENG)
Technical note: Constructive Controversy (Ch. 3) in "THE HANDBOOK OF CONFLICT RESOLUTION: THEORY AND PRACTICE" (CED)

SESSIONS 8 - 9 (LIVE IN-PERSON)

The Promise of Mediation

Article: "The mediation movement. Four diverging views" in "The promise of mediation : responding to conflict through empowerment and recognition" (CED)
Technical note: Mediation Secrets for Better Business Negotiations (HLS)
Core values and types of mediators. Mediation is important not only for mediators but also for negotiators, who need to know how to make good use of a third party. This unit considers mediation tools and techniques in connection with a hypothetical case involving the negotiation of a cease-fire.

SESSION 10 (ASYNCHRONOUS)

Reflection - Mediation

SESSIONS 11 - 12 (LIVE IN-PERSON)

Cultural Impact & Multiculturalism

Technical note: Overcoming Cultural Barriers in Negotiation (HLS)
Article: The Chinese Negotiation (HBS R0310E-PDF-ENG)
Practical Case: ICS Questionnaire (ICS) (CED)
Intercultural Conflict Style Inventory

SESSIONS 13 - 14 (LIVE IN-PERSON)

Power Dynamics & Conflict

Technical note: Salary Negotiations (HLS)
Major sources of power and strategies.

SESSIONS 15 - 16 (LIVE IN-PERSON)

Multiparty Negotiation

Article: Winning and Blocking Coalitions: Bring Both To a Crowded Table (HBS N0401B-PDF-ENG)
Article: New Insights into Coalition Negotiations—The Case of German Government Formation (Negotiation Journal Month 2020) (CED)

SESSION 17 (ASYNCHRONOUS)

Reflection - Multiparty Negotiation

SESSIONS 18 - 19 (LIVE IN-PERSON)

Perceptions & Cognitive Bias

- Stereotypes
- Halo effect
- Selective perception
- Projection
- Sunk cost
- Nudging

SESSIONS 20 - 21 (LIVE IN-PERSON)

International negotiations group presentations

Working Paper: Escola de Cultura de Pau. Alert 2019! Report on conflicts, human rights and peacebuilding (Icaria Editorial / Escola de Cultura de Pau, UAB))

- Mali
- Western Sahara
- Nicaragua
- Venezuela
- Dominican Republic – Haiti
- Hong Kong
- Brexit

SESSION 22 (ASYNCHRONOUS)

Real Case Studies Online Exercise

SESSIONS 23 - 24 (LIVE IN-PERSON)

Framing & Reframing

Article: Dealmaking Disrupted: The Unexplored Power of Social Media in Negotiation (Negotiation Journal Winter 2021) (ced)
Article: Special Section Social Media Influence on Diplomatic Negotiation: Shifting the Shape of the Table (Negotiation Journal Month 2021) (ced)
Technical note: Changing the Narrative. The Role of Communications in Transitional Justice (Institute for Integrated Transitions (IFIT))

SESSIONS 25 - 26 (LIVE IN-PERSON)

Public Advocacy

Article: Process Design for Secret Negotiations (IFIT PRACTICE BRIEF, APRIL 2019) (ced)
Article: The Role of Issues in Negotiation: Framing, Linking, and Ordering (Negotiation Journal Season 2021) (ced)

SESSION 27 (ASYNCHRONOUS)

Advocacy vs. Lobby

- Online discussion forum

SESSIONS 28 - 29 (LIVE IN-PERSON)

Discussion and Conclusions

Working Paper: Building resilience to reduce polarisation and growing extremism (Bridge Project, European Forum for Urban Security, June 2019)
Article: In Theory. Open to Debate: Reducing Polarization by Approaching Political Argument as Negotiation (Negotiation Journal Summer 2021) (ced)

SESSION 30 (ASYNCHRONOUS)

Final Paper

BIBLIOGRAPHY

Compulsory

- Roy J. Lewicki, Bruce Barry, David M. Saunders. (2020). *ISE Essentials of Negotiation.* 7th Edition. Mc Graw Hill. ISBN 9781260570458 (Printed)

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EVALUATION CRITERIA

Criteria	Percentage	Comments
Class Participation	10 %	
Workgroups	40 %	Role-play simulation
Group Presentation	20 %	International conflicts group presentations
Individual Work	30 %	Final Paper

Readings:

All readings are to be completed by the due date of the session.

Class Participation and Workgroups:

- In each class there will be opportunities to discuss concepts as a large class and in small groups.
- There will be time for individual reflection on the class concepts and experiences and at times group reflection, as well.
- There will be role-plays, simulations and other activities depending on the topic.
- There will be several chances for informal group presentations.

Group Presentation:

In this assignment, your group will be graded on its selection of a negotiation with appropriate scope; how well it depicts the public advocacy context and applies negotiation concepts and theories; the quality of the written outline and how well the outline is supported; the extent to which your group demonstrates creativity in the presentation of the group project; and each member's level of engagement in the project.

Individual Work:

In this assignment, you will be graded on how responsive your paper is to the question posed; the quality of the reflections on such questions based on the learning that took place in class and as a result of the in- class role play, and how well these reflections are supported. Include some background information to set the context, introduction of frameworks to analyze the negotiation, and make recommendations for how to address the conflict and rationale for why. Your assignment is to explore the topic beyond the required readings. Minimum of three (3) citations need to be used. The papers is to be double spaced, with one-inch margins, 12 pt. font. Citations and references are to be in APA format. A minimum grade of 5 in the Final Paper isrequired to pass the course.

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade.

Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today ?s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goal 10 (Reduce Inequalities), 16 (Peace, Justice and Strong Institutions), and 17 (Partnerships for the Goals). Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

In-person attendance is **mandatory** at IE University, as it is an essential factor of IE ?s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session. Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other cases of force majeure, are to be consulted with the Program Management (bir.madridoffice@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

- The retakes will consist of a comprehensive exam or equivalent assignment. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.
- Dates and location of the retakes will be posted in advance and will not be changed.
- The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **ADRIAN JOFRE BOSCH**

E-mail: ajofre@faculty.ie.edu

ADRIAN JOFRE BOSCH

Negotiation and Public Advocacy Expert

Partner and President at beBartlet. He is an Economy graduate from the Universitat Pompeu Fabra, and in Negotiation and Conflict Resolution at Columbia University. He also holds a Master degree from ICADE in Highly Regulated Industries. He is a fellow researcher at the Elcano Royal Institute and an associate professor at the IE School of Global and Public Affairs, ESADE, and the Spanish Diplomatic School. An arbitrator of the Madrid Civil and Mercantile Court of Arbitration (CIMA) and a professional mediator registered in the Ministry of Justice of Spain.

He has worked as a business consultant in one of the major companies in the sector, specializing in reorganization processes (efficiency, M&A, digitization, etc.) and new business models. He has also worked as a political analyst for CNN en Español and collaborated with different written press, radio and television media. Furthermore, he has been a member of a diplomatic delegation to the United Nations conducting advisory and political coordination tasks, as well as great consular experience.

beBartlet is a public advocacy firm, based in Madrid and Barcelona. Based on our knowledge and sensitivity regarding generational, territorial, and gender gaps, as well as the breach between the public and private worlds, we analyze the political, social, and economic context and we develop strategies for alliances, social mobilization and corporate diplomacy that contribute to our client's reputation and leadership.

OTHER INFORMATION

Instructor: Prodessor Adrian Jofre Bosch ajofre@faculty.ie.edu

Office Hours: Before/after class or by appointment

Response Policy: The best way to contact me is via email. I typically respond to emails sent Monday through Friday (before 8pm) within 24 hours. I typically respond to emails sent to me after 3pm on Friday and on weekends within 48 hours.

CODE OF CONDUCT IN CLASS

1. Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.

2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and,consequently, will be marked as "Absent".

5. Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

6. No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

7. Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

CHINA: GEOPOLITICS AND POLITICAL ECONOMY

IE University
Professor: **MIGUEL OTERO IGLESIAS**

E-mail: motero@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
SUBJECT DESCRIPTION

This is a course to understand how China is transforming international relations (Geopolitics) and the international political economy. It focuses on the re-emergence of China as a (partial) global power over the past 40 years. For that it covers China's long history, its opening-up and reform period with Deng Xiaoping, the entry in the WTO and its consequences, contemporary debates about the strengths and weaknesses of its economy and its foreign policy agenda laid out in the New Silk Road of the Belt and Road Initiative. In order to understand the power and influence of China it analyses its political and socio-economic development model and how this impacts different key regions of the world (in the Northern and Southern hemispheres). After this course, students will have a good grasp of the political economy of China and its ramifications for world affairs and have the basic knowledge to undertake more specialised courses on China and world politics and economics.

OBJECTIVES AND SKILLS

1. Functional knowledge of the main historical and contemporary drivers, actors and tensions in China's poltical economy and its impact on world affairs

2. Intellectual capacities

   2.1 Identifying and integrating relevant information and demonstrate the capacity of analysing a situation, a process and an environment related to China and international relations

   2.2 Show the capacity of critical thinking in elaborating an argumentation on key debates and processes around China and geopolitics and political economy

3. Interpersonal, teamwork and communication skills

   3.1 Demonstrate effective team interaction skills.

   3.2 Acquire the confidence to address a large group and defend a particular position

   3.3 Develop and apply skills of personal organisation, anticipation, planning (time management) and methodological rigour.

METHODOLOGY

Most sessions will have the following structure in both the synchronous and asynchronous format:

1) Students will make a 20 minutes group presentation on the topic covered each session building on the required readings

2) Q&A, the rest of the class will have the opportunity to ask questions and comment on the topic (either face to face or in asynchronous mode)

3) The professor will comment on the presentation and clarify doubts, expand some of the explanations, if necessary

4) The class will react to those and continue the debate

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15 hours
Discussions	6.67 %	5 hours
Exercises	6.67 %	5 hours
Group work	26.67 %	20 hours
Other individual studying	40.0 %	30 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)
Intro to the Course: The Importance of China

Video: Understanding the Rise of China (Youtube)

Article: Danny Quah: The Global Economy's Shifting Centre of Gravity. (Global Policy Volume 2 . Issue 1 . January 2011) (CED)

SESSION 2 (LIVE IN-PERSON)
The History of China

Article: Confucianism and Contemporary Chinese Politics (Politics & Policy, Volume 35, No. 1) (CED)
Video: Zhang Yimou: To Live (Youtube)
Book Chapters: RECOMMENDED. Henry Kissinger: On China. (available at IE Library)
Book Chapters: China in World History (available at IE Library)

SESSION 3 (LIVE IN-PERSON)
The Political System of China

Working Paper: The Emerging Model of Economic Policy Making under Xi Jinping. CIGI Papers No. 180 — July 2018 (ISSUU)
Article: Integrating Wealth and Power in China: The Communist Party's Embrace of the Private Sector (The China Quarterly , Dec., 2007, No. 192) (CED)
Article: We are the (National) Champions: Understanding the Mechanisms of State Capitalism in China. (STANFORD LAW REVIEW, Vol. 65:697, April 2013) (CED)
Book Chapters: The Party: The Secret World of China's Communist Rulers. CH 1 & 2 (See

Bibliography)
Article: What the West Gets Wrong About China (HBS S21031-PDF-ENG)

SESSION 4 (LIVE IN-PERSON)
The Economy of China
Article: China Confronts the Mundell-Fleming Trilemma (Project Syndicate, Feb 26, 2018)
Working Paper: Made in China 2025. Merics, No 2 | December 2016 (Merics, Aug 12, 2016)
Article: Sino-Capitalism: China's Reemergence and the International Political Economy (World Politics 64, no. 4 (October 2012), 741–76) (CED)
Book Chapters: Red Flags : Why Xi's China Is in Jeopardy. CH 3 & 4 (See Bibliography)
Article: State-Business Relations Under Xi: What has (and hasn't) changed and what are the implications? (LSE, November 23rd, 2020)

SESSION 5 (LIVE IN-PERSON)
China´s Military Power
Book Chapters: China´s 2019 Defence White Paper (China's State Council) (ced)
Technical note: China's New 2019 Defense White Paper (CSIS, July 24, 2019)

SESSION 6 (LIVE IN-PERSON)
China and its regional disputes
Article: US makes unnecessary waves in South China Sea (Global Times)
Article: World cannot ignore Chinese aggression in South China Sea (Nikkei Asia, May 30, 2020)
Article: A history of boorishness: Chronicling China's border brawls in the neighbourhood (The Economic Times, Jul 02, 2020)
Article: What's China's 'nine-dash line' and why has it created so much tension in the South China Sea? (South China Morning Post, 12 Jul, 2016)

SESSION 7 (LIVE IN-PERSON)
China in Africa
Article: China's Aid to Africa: Monster or Messiah? (Brookings, Friday, February 7, 2014)
Article: China's Investments In Africa: What The Data Really Say, And The Implications For Europe (Medium.com, Aug 6, 2019)
Article: Why Africa loves China (Aljazeera.com, 6 Jan 2019)

SESSION 8 (LIVE IN-PERSON)
China in Latin America
Working Paper: China in Latin America: Repercussions for Spain (Real Instituto Elcano, Working Paper 3/2015 | October 2015)
Multimedia Documentation: China in Latin America: partner or predator? (South China Morning Post)

SESSION 9 (LIVE IN-PERSON)

China's Belt and Road Initiative

Article: Chinese Perspectives on the Belt and Road Initiative: Strategic Rationales, Risks, and Implications (INSS, Sept. 27, 2017)

Article: China's Belt and Road Initiative: Perspectives from India. China & World Economy 25(5):78-100 · September 2017 (China & World Economy / 78–100, Vol. 25, No. 5) (CED)

Working Paper: President Xi Jinping's "Belt and Road" Initiative. (CSIS Report, March 28, 2016)

Working Paper: Europe and China's New Silk Roads. European Think-tank Network on China (ETNC, December 2016)

SESSION 10 (LIVE IN-PERSON)

China and Russia Relations

Article: Strategic Conditions of Russia-China Entente (Valdai Club, 04.03.2020)

Practical Case: Countering Russian & Chines Influence Activities (CSIS)

Article: China, Russia reaffirm mutual support on core interests, sovereignty (Global Times)

Article: Comrades Putin and Xi (Blog LSE, April 13th, 2021)

SESSION 11 (LIVE IN-PERSON)

EU-China Relations

Practical Case: EU-China – A strategic outlook (European Comission)

Practical Case: EU-China trade and investment relations in challenging times (European Parliament, PE 603.492 - May 2020)

Working Paper: Europe in the Face of US-China Rivalry (European Think-tank Network on China (ETNC, January 2020))

SESSION 12 (LIVE IN-PERSON)

China's Multilateralism

Working Paper: China's emerging institutional statecraft (Report Brookins, April 2017)

Article: Multilateralism Chinese Style (Foundation Robert Schuman)

Video: "What China Will Be Like As A Great Power" (Youtube)

SESSION 13 (LIVE IN-PERSON)

US-China Rivalry

Video: Has China Won? Mahbubani vs Mearsheimer (Youtube)

Article: There Is Little Dignity in Trump's Trade Policy (Foreign Affairs, July 9, 2020)

Article: America Can—and Will—Win the Trade War (The National Interest, October 11, 2019)

Article: The Balance of Soft Power (Foreign Affairs, July/August 2022)

SESSION 14 (LIVE IN-PERSON)

China in the digital age

Article: What do young Chinese think about social credit? It's complicated (Merics, Mar 26, 2020)

Article: Technological Competition and China (CSIS, NOVEMBER 2018)

Technical note: Rethinking Strategic Autonomy in the Digital Age (European Comission, Issue 30 July 2019)

SESSION 15 (LIVE IN-PERSON)

The New Cold War

Article: Remarks on the Administration's Policy Toward China. (Hudson Institute, Thursday October 4, 2018)

Article: Is the Cold War coming back? Taipei Times (Taipei Times, Mon, Nov 05, 2018)

Article: The Thucydides Trap. (Foreign Policy, JUNE 9, 2017)

Article: Can China Rise Peacefully? (The National Interest, October 25, 2014)

Article: The Coronavirus Pandemic and a Once-in-a-Century Change (Blog Reading the China Dream)

Book Chapters: RECOMMENDED Destined for War: Can America and China Escape Thucydides's Trap? (available at IE Library)

BIBLIOGRAPHY

Compulsory

- George Magnus. *Red Flags: Why Xi's China Is in Jeopardy.* Yale University Press. ISBN 9780300246636 (Digital)
- Richard McGregor. (2012). *The Party: The Secret World of China's Communist Rulers.* Harper Perennial. ISBN 9780061708763 (Digital)

Recommended

- Henry Kissinger. (2012). *On China.* Penguin. ISBN 9780141049427 (Printed)
- Odd Arne Westad. (2012). *Restless empire: China and the world since 1750.* Vintage Digital. ISBN 9780099569596 (Digital)
- Cheng Li. (2016). *Chinese Politics in the Xi Jinping Era.* Brookings Institution Press. ISBN 9780815726920 (Digital)
- Robert Wade. (2003). *Governing the Market: Economic Theory and the Role of Government in East Asian Industrialization.* Princeton University Press. ISBN 9780691117294 (Digital)
- Andrew T.H. Tan. (2015). *Security and Conflict in East Asia.* 1. Routledge. ISBN 9781857437171 (Digital)
- Graham Allison. (2018). *Destined for War: Can America and China Escape Thucydides's Trap?.* Mariner Books. ISBN 9781328915382 (Digital)

EVALUATION CRITERIA

Attendance and participation in discussions is compulsory

50%	Individual essay (1,500 words long)
40%	Group presentations in class
10%	Individual participation in general discussion
100%	

Students will choose their own research questions, which need to be approved by the professor beforehand. The essays will need to be submitted in class in hard copy in session 15.

Criteria	Percentage	Comments

Individual Essay	50 %	
Group Presentation	40 %	
Individual Participation	10 %	

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt should contact the professor during the first two weeks of the course.

ATTENDANCE

Attendance is **mandatory** at IE University, as it is an essential factor of IE´s learning methodology, a continuous process of learning through participation in class, other students' contributions and presentations, among others. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0,0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year. Having established the rule, we strongly discourage to use this buffer as granted, we highly recommend to attend 100% of the classes as it will improve your learning outcomes, it will increase the class performance and it might improve your participation grade.

Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other contexts involving force majeure, are to be consulted with the Program Management team for assessment of the situation and corresponding documentation, so that Program Management can support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

- The retakes will consist of a comprehensive exam. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.
- The exam will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.
- Dates and location of the retakes will be posted in advance and will not be changed.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

- providing faulty sources;

- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. The professor will advise the student on how to present said material. All written assignments have to be submitted through Turnitin, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the Academic Ethics Committee. Very high similarity scores will be automatically flagged and forwarded to the Academic Ethics Committee. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **MIGUEL OTERO IGLESIAS**

E-mail: motero@faculty.ie.edu

Academic Education
Post-doctoral Research Fellow in Political Economy, London School of Economics & Political Science

PhD in International Political Economy, Oxford Brookes University
Master in International Political Economy, University of Manchester
Licenciado en Ciencias de la Información, Universidad de Santiago de Compostela

Academic Experience
Professor of Practice at IE School of Global and Public Affairs

Assistant Professor in International Political Economy, ESSCA School of Management, Paris.
Adjunct Lecturer in Regional Integration, University of Oxford

Visiting Research Fellow at IWEP, CASS, Beijing; IRI-PUC Rio de Janeiro and MERICS, Berlin
Guest Lecturer in over 20 universities and postgraduate centres
Author of The Euro, the Dollar and the Global Financial Crisis

Author of more than 100 articles in peer-reviewed journals, book chapters and op-eds in Spanish and international press such as El País, The Financial Times and Foreign Affairs.

Co-founder of the European Think Tank Network on China (ETNC)

Practical Work Experience
Senior Analyst for the International Political Economy at the Elcano Royal Institute
Advisory roles for the OECD, the European Commission and the Spanish Government

OTHER INFORMATION

miguel.otero@rielcano.org

CULTURE AND LEADERSHIP IN ANCIENT ROME

IE University
Professor: **JULIO BATISTA CAMPILLI**

E-mail: jbatista@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
There are no prerequisites for this course.

SUBJECT DESCRIPTION

"Rise of an empire: Culture and leadership in ancient Rome" will present a detailed overview of the rise of the Roman empire, from its birth to the dominion of the Mediterranean and its shores. The class will cover the foundation of Rome, its expansion across the Italian peninsula, and the three Punic wars until Rome´s final victory over the Carthaginian empire.

The factors that permitted a primitive village to grow and rule the known world will be studied, as well as the cultural and social elements that allowed Rome to attain and maintain its political and military superiority. Both primary and secondary sources will be read and analyzed, reviewing classical historiography through antiquity's greatest authors.

The history of ancient Rome can help us to better understand our present, providing us with the first examples of the eternal questions of deterrence, balance of power, preventive war, treaty and diplomacy. It also reveals the richness and universality of our Roman heritage.

OBJECTIVES AND SKILLS
Upon successful completion of this course, students will be able to:

1. Understand the main milestones of early human development in the Mediterranean basin as well as the economic and commercial conditions that accompanied the emergence of political entities.

2. Become acquainted with ancient historiography, its challenges, and the works of its greatest authors: Sallust, Tacitus, Polybius, and Livy. Understand early Mediterranean mythology and how it relates to the historical record.

3. Become familiar with the nations and tribes which inhabited the Italian peninsula and understand the causes and milestones of early Roman expansion. Identify Rome's key success factors and how they became embedded into its culture from an early date.

4. Become familiar with the origins and rise of the Carthaginian empire. Understand the factors

which led to competition and rivalry with the rising Roman empire. Understand the causes, consequences and main events of the three wars between Rome and Carthage.

5. Understand the successes and failures of the evolving military and political strategies and tactics used by the belligerents. Become acquainted with the personalities of the main political and military leaders.

6. Recognise the cultural, intellectual, and political legacy of the Roman empire in our modern world, with a particular focus on the Iberian peninsula.

In addition the following skills will be practiced:

- Critical analysis and creative thinking.
- Comprehensive reading of ancient historical documents.
- Independence of stereotypical historical representations.

METHODOLOGY

This course will use the IE liquid learning methodology, blending physical, digital and natural environments so that students obtain a world class education, no matter their location or situation. It combines three essential elements: syncrhonous interactions, asynchronous interactions and individual inquiry and discovery.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	40.0 %	30 hours
Discussions	13.33 %	10 hours
Exercises	13.33 %	10 hours
Group work	6.67 %	5 hours
Other individual studying	26.67 %	20 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction. The study of ancient history and the use of primary sources. The extent and importance of the Roman legacy. Basic Latin language structure and pronunciation

SESSION 2 (ASYNCHRONOUS)

Roman/Latin research project

SESSION 3 (LIVE IN-PERSON)

The Mediterranean from the beginning of the bronze age to the foundation of Carthage. The Carthaginian civilization: Politics, religion, and mercenary war.
Reading:
Book Chapters: Gustave Flaubert, Salammbo, chapters 1 -7 (See Bibliography)

SESSION 4 (LIVE IN-PERSON)

The Etruscan civilization. The birth of Rome and its early expansion in the Italian peninsula. Mythology, early leaders and legends.
 Reading:
Book Chapters: Livy, Book I, chapters I – XII (extracts) (See Bibliography)

SESSION 5 (LIVE IN-PERSON)
 The rise of the rivalry between Rome and Carthage: Economic and geopolitical factors, Sicily and the competition for its resources. The mercenary societies.
 Reading:
Book Chapters: Livy, Book I, chapters I – XII (extracts) (See Bibliography)

SESSION 6 (LIVE IN-PERSON)
 The first Punic war. Roman and Carthaginian forces, leaders and strategies. Tactical innovations.
 Reading:
Book Chapters: Polybius (extracts) (See Bibliography)

SESSION 7 (ASYNCHRONOUS)
 Role playing exercise: Competitive analysis, strategy generation and evaluation.

SESSION 8 (LIVE IN-PERSON)
 Hamilcar, Hannibal, and the Barcas of Carthage. Diplomacy, treaties, and the elusive peace. The political and economic importance of the Iberian peninsula.
 Reading:
Book Chapters: Gustave Flaubert, Salammbo, chapters 8 -15 (See Bibliography)

SESSION 9 (LIVE IN-PERSON)
 The immediate causes of the Second Punic War. Alliance politics. Hannibal crosses the Alps.
 Reading:
Book Chapters: Tacitus (extracts) (See Bibliography)

SESSION 10 (LIVE IN-PERSON)
 The initial victories and the opposing objectives. Hannibal's elusive and frustrated domination of the Italian peninsula.
 Reading:
Book Chapters: Livy (extracts) (See Bibliography)

SESSION 11 (LIVE IN-PERSON)
 Carthaginian politics. The leadership of Scipio Africanus. The defeat of Hannibal and the end of Second Punic war.
 Reading:
Book Chapters: Livy (extracts) (See Bibliography)

SESSION 12 (LIVE IN-PERSON)

Cato the elder and the case for preventive war. The third Punic war and the destruction of Carthage.

Reading:

Book Chapters: B.H. Liddell Hart (extracts) (See Bibliography)

SESSION 13 (LIVE IN-PERSON)

The Roman Republic after the wars: Political and social evolution.

Reading:

Book Chapters: Sallust (extracts) (See Bibliography)

SESSION 14 (LIVE IN-PERSON)

The legacy of the Punic wars. Why are we Roman? Culture and leadership in Rome and Carthage

Reading:

Book Chapters: B.H. Liddell Hart (extracts) (See Bibliography)

SESSION 15 (LIVE IN-PERSON)

Final Exam

BIBLIOGRAPHY

Recommended

- Gustave Flaubert. *Salammbo.* ISBN 9782346135264 (Digital)

- Livy. *AB URBE CONDITA.* ISBN 9783126231824 (Digital)

- Polybius. *The Histories.* ISBN 9781465593221 (Digital)

- Tacitus. *Annals and histories.* ISBN 9780307431936 (Digital)

- Sallust. *The conspiracy of Caitlin and the Jugurthine war.* ISBN 9781420924701 (Digital)

- B. H. Liddell Hart. *Scipio Africanus – Greater than Napoleon.* ISBN 9781283140201 (Digital)

EVALUATION CRITERIA

Criteria	Percentage	Comments
Final Exam	30 %	
Individual Work	40 %	Essays and projects

Class Participation	30 %	Details in class

PROFESSOR BIO

Professor: **JULIO BATISTA CAMPILLI**

E-mail: jbatista@faculty.ie.edu

JULIO BATISTA CAMPILLI

Julio Batista Campilli graduated from Yale University in 1982 with a B.A. in History. He obtained an M.B.A. at the Stanford Graduate School of Business in 1985. After serving as an officer in the Swiss mountain troops, he developed a professional career in strategic consulting and telecommunications in Europe and The United States, in companies like the Boston Consulting Group, Vodafone, and Seeliger y Conde.

He has studied and maintained a strong interest in various historical and literary periods, particularly the Roman Empire, the Napoleonic wars and nineteenth century and early twentieth century Europe, as well as the evolution of Romanticism in literature and music.

Julio Batista Campilli is presently also teaching European literature at the Instituto Petrarca in Madrid.

OTHER INFORMATION
Email address: jbatista@faculty.ie.edu

DIALOGUE FOR CONFLICT RESOLUTION

IE University
Professor: **ANAT ZIFF**

E-mail: aziff@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

Students interested in exploring the role of interpersonal and inter-group dialogue in global conflict dynamics and resolutions. No previous knowledge or experience is required.

SUBJECT DESCRIPTION

This seminar will be dedicated to exploring the significant role of interpersonal and inter-group dialogue in conflicts resolution and transformation processes, with special focus on the narrative approach. After an introductory session outlining the essence of dialogue and presentations introducing theories and perceptions of conflict, intractable global conflicts, strategies for conflict resolutions, and the complex, fast changing cultural and technological environment in which we live and work, students will participate in a global conflict simulation in which each will play one of the parties to investigate and unpack that conflict and develop possible transformations. In-class exercises will be debriefed, and the students will ultimately be able to identify innovative ways using dialogue to transform rivalry situations into peaceful co-existence with differences.

Through discussion and live simulation exercises, students will gain a deeper understanding of the complexity of global, long-running conflict situations. From border disputes to deep-rooted identity based conflicts, they will get an insider perspective and the opportunity to systemically analyze and understand the processes and dynamics that lead to escalations and alienations. The students will become familiar with the principal factors that divide parties, points of contention, and the use of dialogue to systemically change hostile situation co-creating sustainable relations. In the course, students will be presented with different resolution strategies, from settlements to dialogue and reconciliations, and become able to identify and skillfully design possible transformations for different conflict situations.

OBJECTIVES AND SKILLS

The goal of the course is for students to gain a profound understanding of the dynamics that determine the course of long running global conflicts, and understand how to develop dialogue-based resolution strategies designed to transform them.

1.   Students will be able to identify and analyze the predominant factors in conflict processes/behaviors.

2.   Students will become familiar with the convoluted processes of dialogue between groups in complex, deep-rooted conflict.

3.   Students will have the opportunity to identify and design innovative strategies leading to conflict transformation.

METHODOLOGY

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	26.67 %	20 hours
Discussions	20.0 %	15 hours
Exercises	20.0 %	15 hours
Group work	13.33 %	10 hours
Other individual studying	20.0 %	15 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE ONLINE)

1.   *Why Dialogue?* Dialogue is a prominent conflict resolution tool that both resolves problems and offers a significant systemic change to the conflict situation, that opens possibilities for long term resolution.

Instructor Presentation. Students' comments, questions, expectations and desires of the course.

SESSION 2 (LIVE ONLINE)

Understanding *Conflicts and Intractable Conflicts:* From Disagreements to Rivalries to War.

Instructor presentation of theory and global case studies.

SESSION 3 (LIVE ONLINE)

Strategies Toward Positive Results: From Problem Solving to Conflict Situation Transformation and Resolution.

Instructor presentation followed by discussion and short exercises, exploring and identifying students' conflict management 'styles'.

SESSION 4 (LIVE ONLINE)

Conflicts in Context: Cultural Values and Conflict Behaviors

Instructor Presentation.

- Students submit 1st short essay, describing and analyzing a significant international, intractable conflict.

SESSION 5 (LIVE ONLINE)

The Practice of Dialogue: *Simulation of Dialogue* between Israelis and Palestinians

Simulation followed by in-class debrief, discussing theory, methodology and techniques.

SESSION 6 (LIVE ONLINE)

The Practice of Dialogue: *Simulation of Dialogue (Continued)* between Israelis and Palestinians
Simulation followed by in class debrief, discussing theory, methodology and techniques.

SESSION 7 (ASYNCHRONOUS)

The *Foundamental Role of Collective Narratives in Individual and Group Identities* and in *Intractable Conflicts.*
Instructor Presentation.

- Students submit 2nd short essay, describing and analyzing their group-bio narratives.

SESSION 8 (LIVE ONLINE)
Dialogue and Mediation Skills: Learning to **design and build bridges** while exploring what is the conflict really about, and what do the parties **want and need?**

Exercise and Discussion: Identifying the core dispute(s) while building bridges between rivaling groups.

SESSION 9 (LIVE ONLINE)
Communication Skills in Dialogue: Improving Interpersonal and Intergroup Communication for creating a safer shared space.

Practical Exercises in class for improving Interpersonal and Intergroup Communication skills.

SESSION 10 (LIVE ONLINE)
Students' group presentations of global conflict situations scenarios, transformation and dialogue.

The presentations will be followed by questions, comments, and discussion.

SESSION 11 (LIVE ONLINE)
Students' group presentations of global conflict situations scenarios, transformation and dialogue (continue).

The presentations will be followed by questions, comments, and discussion.

SESSION 12 (ASYNCHRONOUS)
Communication Technology, Social Networks and Media role in the Politics of Identity and creating the 'Other': Are we being better informed and getting more connected or drifting further apart?
Students' independent work using conflict cases as they are potrayed in the social media.
Article: Yes, Social Media Really Is Undermining Democracy (The Atlantic, July 28, 2022)

SESSION 13 (LIVE ONLINE)
How Far Would You Go? The Role of Ethics in Building Trust and Dialogue.

Instructor Presentation. Students reflective work identifying and analyzing ethical dilemmas in global conflicts and resolutions.

SESSION 14 (LIVE ONLINE)

Complex Environments: Dialogue Among Three Parties
Exercise, debrief and class discussion: the dialogue within and between.

SESSION 15 (LIVE ONLINE)

Changing the Dynamic of a Conflict Situation: Co-Creating Sustainability, application and innovation
In class review, discussion and application.

EVALUATION CRITERIA

Two short essays, submitted during the semester (20%),
Individual or group short in-class presentation (40%),
Final short essay submitted at the end of the semester (30%) ,
Participation in class exercises and discussions (10%).

Criteria	Percentage	Comments
Individual Short Essays	20 %	
Group Presentation	40 %	
Final Short Essay	30 %	
Class Participation	10 %	

PROFESSOR BIO

Professor: **ANAT ZIFF**

E-mail: aziff@faculty.ie.edu

Anat Ziff, M.A. is an international organizational studies professor and management consultant who has improved the effectiveness of students, managers and executive teams in the public and private sector on four continents. She has taught at universities in the U.S., Italy, Venezuela, and Colombia, founded two non-profit organizations, and is a Partner Consultant in the Barcelona-based management-consulting firm INNOVA.

OTHER INFORMATION

ESPAÑOL PARA LOS NEGOCIOS

IE University
Profesor: **VIRGINIA ANA ESCOBAR SARDIÑA**

Correo electrónico: vescobar@faculty.ie.edu

Año académico: 23-24
Año de curso: CUARTO
Semestre: 1º
Categoría: OPTATIVA
Nº de créditos (ECTS): 3.0
Idioma: Español

PREREQUISITOS
Español 2.1 · Español Intermedio · Placement Test

DESCRIPCIÓN DE LA ASIGNATURA
COURSE DESCRIPTION

This course is designed to develop the students' ability to use Spanish accurately and correctly in order to communicate and express their views about a range of topics related to the business area, such as local and international companies, business responsibilities, sustainable development, multicultural companies, and globalization. Further communicative contexts belonging to professional situations in Spain and in Latin America are introduced. This is a Spanish language course designed for Spanish language learners.

  COURSE CREDITS ECTS   3

OBJETIVOS Y HABILIDADES
COURSE OBJECTIVES

At the completion of this level, students will be able to (in accordance with common EU language level B1-B2):

- *Understand the main points of clear standard speech on familiar matters regularly encountered in work, leisure, college, etc.
- *Understand the main point of many radio or TV programs on current affairs or topics of professional interest when the delivery is relatively slow and clear.
- *Understand texts that consist mainly of high frequency every day and job-related language.
- *Understand the description and communication of events, feelings and wishes in professional letters and emails, taking into account the written skills needed.
- *Deal with most situations likely to arise whilst working in an area where Spanish is spoken. Enter unprepared into conversation on topics that are familiar, of personal interest or pertinent to everyday life and work (e.g. family, hobbies, work, travel and current events).
- *Connect phrases in a simple way in order to describe experiences and events, dreams, hopes

and ambitions.

- *Briefly give reasons and explanations for opinions and plans in order to discuss different points of view.
- *Narrate a story or relate the plot of an article, a book or a film and describe personal reactions.
- *Write simple connected text on topics that are of professional or personal interest.
- *Write letters describing work experience and personal impressions.

METODOLOGÍA

TEACHING/LEARNING STRATEGIES (METHODOLOGY)

Liquid Learning at IE University is a transformational and interactive educational experience that transcends single methodologies and platforms to blend physical, digital, and natural environments so that students obtain a world-class education no matter their location, profession, or situation. Students will learn alongside one other and work together in teams.

In today´s reality, the learning process had to be adapted to bring together the human, digital, and natural worlds into a seamless whole, and enables IE University to be – and offer to students and faculty – a truly global campus, flexible enough to allow students to study from wherever they are.

Liquid Languages offers students an innovative, fluid adaptable, student-centered language learning experience. The methodology continues to teach languages focused on a communicative teaching approach, now adapted to our new situation. Students will be required to actively participate in all session learning (live interactive video conference) and outside session learning (pre-, post- and transversal activities done individually or in groups). Through professor instruction and student-centered learning, students will develop their ability to communicate and express themselves in the target language. A variety of instructional techniques and tools are used, including group or pair work, student presentations, video assignments, ed-tech tools, etc. in order to maximize the practice and development of the four main skills in language acquisition, needed to communicate in our modern world: listening, reading, speaking and writing.

The methodology used to teach Spanish focuses on a communicative teaching approach. Students will be required to actively participate in a student-centered learning system that will help them to understand their surroundings and express themselves in the target language.

In order to optimize their academic flexibility, students will be instructed in different ways, including instructional lectures, group or pair work, student presentations, etc.

Metodología de enseñanza	Peso	Tiempo dedicado por parte del estudiante
Presentaciones	20.0 %	15 horas
Discussions	26.67 %	20 horas
Ejercicios	17.33 %	13 horas
Trabajo en grupo	18.67 %	14 horas
Otros, individual	17.33 %	13 horas
TOTAL	100.0 %	75 horas

PROGRAMA

GENERAL ORGANIZATION OF SESSIONS

General organization of sessions

This elective class has a total of 15 sessions during this semester. These 15 sessions will be organized in the following way, always subject to change at the professor´s discretion:

-sessions 1-6 > "La responsabilidad empresarial"

-sessions 7-12 > "El desarrollo sostenible"

-sessions 13-14 > "En los mercados exteriores" / léxico de negocios, preparación para la presentación oral

-session 15 > Final oral and written presentation (final presentation cannot be changed, please make the necessary arrangements to be present in this session)

The evaluation material will include the following:

-several short oral presentations, assigned in class

-a formal written essay (date will be announced in class)

-**the final oral and written presentation (session 15) (final presentation cannot be changed, please make the necessary arrangements to be present in this session)**

Note about the Syllabus session schedule: We reserve the right to improve the student learning experience during the course. Although we aim to keep to the scheduled syllabus, there may be some changes made to the program, based on and in the service of the benefit of the class. Therefore, the syllabus is subject to modification as necessary and advised by the professor. It is also at the professor´s discretion to include more evaluations (such as quizzes, essays, IE Campus activities). Final presentation date, however, will not change.

BIBLIOGRAPHY

We will use material from a series of books designed for Español para los negocios. Professor Escobar will pass the material to the students throughout the semester. Each student is responsible to be in class with all the assigned and required material. Failure to do so may result in negative marking towards the final grade at the Professor's discretion, or the student may be asked to leave the classroom, and therefore have an absence.

As a bibliographic reference, the main books for this material will be the following (remember, you do not have to buy the books, the material will be given in class).

Title: AL DÍ@. Curso intermedio de español para los negocios. Nivel Intermedio (B1-B2). Libro del alumno + CD

Authors: Gisèle Prost, Alfredo Noriega

Editorial / Year: SGEL 2014

ISBN / EAN: 9788497783170

Title: AL DÍ@. Curso intermedio de español para los negocios. Nivel Intermedio (B1-B2). Cuaderno de ejercicios + CD

Authors: Gisèle Prost, Alfredo Noriega

Editorial / Year: SGEL 2014

ISBN / EAN: 9788497783187

Other reference books used in class will be:

Title: Temas de Empresa. Manual para la preparación del Certificado Superior del Español de los Negocios.

Author: María José Pareja

ISBN: 8495986698

Editorial / Year: Edinumen 2005

Title: Socios 2. Curso de español dedicado al mundo del trabajo. (Libro del alumno)
Authors: María Dolores Martínez Rodríguez, María Luisa Sabater
ISBN: 9788484434184
Editorial / Year: Difusión / 2008

Title: Socios 2. (Cuaderno de ejercicios)
Authors: Jaime Corpas, María Dolores Martínez Rodríguez, María Luisa Sabater
ISBN: 9788484434191
Editorial / Year: Difusión / 2008

Title: Profesionales de los negocios. (B1-B2) curso de español
Authors: María José Jimeno y Elena Palacios
ISBN: 9788416108794
Editorial / Year: ENCLAVE-ELE / 2018

SESIÓN 1 (LIVE ONLINE)

Sesiones 1-6: "La responsabilidad empresarial"
A. Léxico y comunicación (vocabulary and communication):
-La economía social en España
-La empresa, ¿motor de la sociedad?
-El Pacto Mundial
-El Grupo SOS, empresa responsable
-Las madereras chilenas y el pueblo Mapuche
-Los pueblos indígenas de América Latina

B. Contenido gramatical (grammar points):
-Presente de indicativo: repaso de las irregularidades
-Pretérito imperfecto
-Pretérito perfecto: formación y construcción
-Participio pasado: irregularidades
-Empleos de ser y estar
Capítulos de Libros: AL DÍ@. Curso intermedio de español para los negocios. Nivel Intermedio (B1-B2). Libro del alumno + CD (ced)
Capítulos de Libros: AL DÍ@. Curso intermedio de español para los negocios. Nivel Intermedio (B1-B2). Cuaderno de ejercicios (ced)

SESIÓN 2 (LIVE ONLINE)

Sesiones 1-6: "La responsabilidad empresarial"
A. Léxico y comunicación (vocabulary and communication):
-La economía social en España
-La empresa, ¿motor de la sociedad?

-El Pacto Mundial

-El Grupo SOS, empresa responsable

-Las madereras chilenas y el pueblo Mapuche

-Los pueblos indígenas de América Latina

B. Contenido gramatical (grammar points):

-Presente de indicativo: repaso de las irregularidades

-Pretérito imperfecto

-Pretérito perfecto: formación y construcción

-Participio pasado: irregularidades

-Empleos de ser y estar

SESIÓN 3 (LIVE ONLINE)

Sesiones 1-6: "La responsabilidad empresarial"

A. Léxico y comunicación (vocabulary and communication):

-La economía social en España

-La empresa, ¿motor de la sociedad?

-El Pacto Mundial

-El Grupo SOS, empresa responsable

-Las madereras chilenas y el pueblo Mapuche

-Los pueblos indígenas de América Latina

B. Contenido gramatical (grammar points):

-Presente de indicativo: repaso de las irregularidades

-Pretérito imperfecto

-Pretérito perfecto: formación y construcción

-Participio pasado: irregularidades

-Empleos de ser y estar

SESIÓN 4 (LIVE ONLINE)

Sesiones 1-6: "La responsabilidad empresarial"

A. Léxico y comunicación (vocabulary and communication):

-La economía social en España

-La empresa, ¿motor de la sociedad?

-El Pacto Mundial

-El Grupo SOS, empresa responsable

-Las madereras chilenas y el pueblo Mapuche

-Los pueblos indígenas de América Latina

B. Contenido gramatical (grammar points):

-Presente de indicativo: repaso de las irregularidades

-Pretérito imperfecto

-Pretérito perfecto: formación y construcción

-Participio pasado: irregularidades

-Empleos de ser y estar

SESIÓN 5 (LIVE ONLINE)

Sesiones 1-6: "La responsabilidad empresarial"

A. Léxico y comunicación (vocabulary and communication):

-La economía social en España

-La empresa, ¿motor de la sociedad?

-El Pacto Mundial

-El Grupo SOS, empresa responsable

-Las madereras chilenas y el pueblo Mapuche

-Los pueblos indígenas de América Latina

B. Contenido gramatical (grammar points):

-Presente de indicativo: repaso de las irregularidades

-Pretérito imperfecto

-Pretérito perfecto: formación y construcción

-Participio pasado: irregularidades

-Empleos de ser y estar

SESIÓN 6 (LIVE ONLINE)

Sesiones 1-6: "La responsabilidad empresarial"

A. Léxico y comunicación (vocabulary and communication):

-La economía social en España

-La empresa, ¿motor de la sociedad?

-El Pacto Mundial

-El Grupo SOS, empresa responsable

-Las madereras chilenas y el pueblo Mapuche

-Los pueblos indígenas de América Latina

B. Contenido gramatical (grammar points):

-Presente de indicativo: repaso de las irregularidades

-Pretérito imperfecto

-Pretérito perfecto: formación y construcción

-Participio pasado: irregularidades

-Empleos de ser y estar

SESIÓN 7 (LIVE ONLINE)

Sesiones 7-12: "El desarrollo sostenible"

A. Léxico y comunicación (vocabulary and communication):

-Energías para el futuro

-¿Cambiamos nuestra política medioambiental?

-Automóvil: la baza ganadora del verde

-Lanzamiento de un producto Bio

-El patrimonio cultural de la humanidad

B. Contenido gramatical (grammar points):

-Presente del subjuntivo

-Usos del subjuntivo

-Futuro de indicativo

-Usos del futuro y su uso con el subjuntivo para planes

-El superlativo / empleo de muy y mucho

Capítulos de Libros: AL DÍ@. Curso intermedio de español para los negocios. Nivel Intermedio (B1-B2). Libro del alumno + CD (ced)

Nota Técnica: AL DÍ@. Curso intermedio de español para los negocios. Nivel Intermedio (B1-B2). Cuaderno de ejercicios (ced)

SESIÓN 8 (LIVE ONLINE)

Sesiones 7-12: "El desarrollo sostenible"

A. Léxico y comunicación (vocabulary and communication):

-Energías para el futuro

-¿Cambiamos nuestra política medioambiental?

-Automóvil: la baza ganadora del verde

-Lanzamiento de un producto Bio

-El patrimonio cultural de la humanidad

B. Contenido gramatical (grammar points):

-Presente del subjuntivo

-Usos del subjuntivo

-Futuro de indicativo

-Usos del futuro y su uso con el subjuntivo para planes

-El superlativo / empleo de muy y mucho

SESIÓN 9 (LIVE ONLINE)

Sesiones 7-12: "El desarrollo sostenible"

A. Léxico y comunicación (vocabulary and communication):

-Energías para el futuro

-¿Cambiamos nuestra política medioambiental?

-Automóvil: la baza ganadora del verde

-Lanzamiento de un producto Bio

-El patrimonio cultural de la humanidad

B. Contenido gramatical (grammar points):

-Presente del subjuntivo

-Usos del subjuntivo

-Futuro de indicativo

-Usos del futuro y su uso con el subjuntivo para planes

-El superlativo / empleo de muy y mucho

SESIÓN 10 (LIVE ONLINE)

Sesiones 7-12: "El desarrollo sostenible"

A. Léxico y comunicación (vocabulary and communication):

-Energías para el futuro

-¿Cambiamos nuestra política medioambiental?

-Automóvil: la baza ganadora del verde

-Lanzamiento de un producto Bio

-El patrimonio cultural de la humanidad

B. Contenido gramatical (grammar points):

-Presente del subjuntivo

-Usos del subjuntivo

-Futuro de indicativo

-Usos del futuro y su uso con el subjuntivo para planes

-El superlativo / empleo de muy y mucho

SESIÓN 11 (LIVE ONLINE)

Sesiones 7-12: "El desarrollo sostenible"

A. Léxico y comunicación (vocabulary and communication):

-Energías para el futuro

-¿Cambiamos nuestra política medioambiental?

-Automóvil: la baza ganadora del verde

-Lanzamiento de un producto Bio

-El patrimonio cultural de la humanidad

B. Contenido gramatical (grammar points):

-Presente del subjuntivo

-Usos del subjuntivo

-Futuro de indicativo

-Usos del futuro y su uso con el subjuntivo para planes

-El superlativo / empleo de muy y mucho

SESIÓN 12 (LIVE ONLINE)

Sesiones 7-12: "El desarrollo sostenible"

A. Léxico y comunicación (vocabulary and communication):

-Energías para el futuro

-¿Cambiamos nuestra política medioambiental?

-Automóvil: la baza ganadora del verde

-Lanzamiento de un producto Bio

-El patrimonio cultural de la humanidad

B. Contenido gramatical (grammar points):

-Presente del subjuntivo

-Usos del subjuntivo

-Futuro de indicativo

-Usos del futuro y su uso con el subjuntivo para planes

-El superlativo / empleo de muy y mucho

SESIÓN 13 (ASYNCHRONOUS)

Asynchronous session to prepare the final presentation with your group. The instructions for the final presentation (session 15) are given in class by the professor. In this asynchronous class you should prepare a work sheet given by the profesor. It will be related to your final oral presentation.

SESIÓN 14 (LIVE ONLINE)

Opción 1: "En los mercados exteriores"

A.   Léxico y comunicación (vocabulary and communication):

-Una historia de alto vuelo: IBERIA

-¿Dónde instalar una filial de nuestra empresa?

-La internacionalización

-Invertir en América Latina

-La expatriación / Selección de un candidato

B.   Contenido gramatical (grammar points):

-Pretérito indefinido

-Cambios ortográficos

-Pretérito pluscuamperfecto

Opción 2: trabajo de vocabulario técnico de negocios y preparación para la presentación oral.

SESIÓN 15 (LIVE ONLINE)

Presentación final de esta asignatura **(FINAL PRESENTATION CANNOT BE CHANGED, please make the necessary arrangements to be present in this final online session, failure to do so will entail a grade of 0 in the final presentation).**

BIBLIOGRAFÍA

Recomendado

 - Gisèle Prost, Alfredo Noriega. *AL DÍ@. Curso intermedio de español para los negocios. Nivel Intermedio (B1-B2). Libro del alumno.* SGEL. ISBN 9788497783170 (Impreso)

Libro del alumno + CD. IT IS NOT NECESSARY TO BUY THE BOOK, THE PARTS WE ARE GOING TO USE ARE GOING TO BE AVAILABLE IN OUR BLACKBOARD.

- Gisèle Prost, Alfredo Noriega. *AL DÍ@. Curso intermedio de español para los negocios (B1-B2). Cuaderno de ejercicios.* SGEL. ISBN 9788497783187 (Impreso)

Cuadernos de ejercicios + CD. IT IS NOT NECESSARY TO BUY THE BOOK, THE PARTS WE ARE GOING TO USE ARE GOING TO BE AVAILABLE IN OUR BLACKBOARD.

SISTEMA DE EVALUACIÓN

A student must have absences justified and approved if beyond the 30% permitted limit before the date of the final exam, or he/she will be denied access to the final evaluation.

1. - Continuous Evaluation	% of Final Grade
Evaluations (oral presentations, essays, quizzes, etc.)	30%
Active Class Participation	10%
Session work	15%
Homework	15%
TOTAL:	70%

2. - FINAL EVALUATION	
Oral presentation	20%
Written expression	10%
TOTAL:	30%

FINAL GRADE:

Continuous evaluation	70%
Final Evaluation	30%
Total:	100%

Attention: the final presentation on session 15 cannot be changed, please make the necessary arrangements to be present in this session.

Extraordinary Evaluations

The extraordinary evaluation in June will be subject to the following rules:

Students who fail the course will have the opportunity to be re-evaluated in June (unless failure was due to excessive absences, in which case the student loses the right to sit both the regular exam and the extraordinary exam). In subsequent evaluations students who failed due to lack of attendance will be reevaluated in the same manner.

The date and location of the extraordinary evaluation in June will be set and published in advance and CANNOT be changed.

The evaluation will allow the student the opportunity to improve the most deficient portions of their grade in order to thus pass the course. This may consist of taking an exam or being required to turn in assignments or other evaluations that were not submitted or earned unsatisfactory grades. If assignments must be turned in, the student may either mail them by **certified mail** by the established deadline or turn them in person on the set date as arranged with the professor.

Once grades are posted, the professor will advise students who failed how to proceed regarding the extraordinary evaluation. The extraordinary evaluation grade (either exam or assignments) will replace the corresponding deficient portion of the final grade, taking into account that the highest grade a student may earn on any of the extraordinary evaluations is 8.0.

Criterio	Porcentaje	Comentarios
Oral presentations, essays, quizzes, etc.	30 %	
Active Class Participation	10 %	
Session Work	15 %	Work done during class time.
Homework	15 %	
Final Presentation (oral and written)	30 %	Final Presentation on session 15.

PROFESOR BIO

Profesor: **VIRGINIA ANA ESCOBAR SARDIÑA**

Correo electrónico: vescobar@faculty.ie.edu

Dra. Virginia Ana Escobar Sardiña

Virginia Escobar Sardiña, PhD is a researcher, a professor, and a translator. She obtained a B.A. degree in Modern Languages at the University of Puerto Rico and a M.A. degree in French at Rutgers, The State University of New Jersey, where she was also trained as a college professor. She has continued to teach foreign languages and literature (Spanish, French and English) for more than twenty years in several universities and schools in New Jersey, Puerto Rico and Spain, always with a communicative approach. She has a Ph.D. from the History and Theory of Theatre doctoral program offered by the Department of Spanish Philology at the Universidad Complutense de Madrid. Her Ph.D. dissertation is titled *"Contemporary Dramaturgies of the West Indies. Cartographies of Poetics in Movement: Teresa Hernández and Josefina Báez".* It is an investigation on the contemporary Caribbean drama of these recognized dancers, performers and playwrights. This dissertation aims to review the concepts of nation and subjectivity through the dramatic analysis of the artistic creations of these two Caribbean performers using mainly the theoretical frames offered by theatrology and dramatology, as well as a rhizomatic structure that incorporates a multiplicity of bodies, poetics, and identities that depict the islands of Puerto Rico, Dominican Republic, and Manhattan.

Virginia created with her doctoral fellows the Association for the research, creation and diffusion of theater written in Spanish called **manodeobra teatro**. This association has given her the opportunity of collaborating with different playwrights, academic investigators, cultural managers and theater companies as a researcher and a performer, such as the Nuevo Teatro Fronterizo under the direction of theater director and playwright José Sanchis Sinisterra. Therefore, she has organized and coordinated cultural events, and activities related to theater, performance and dance. Virginia has also participated in various academic conferences, and published several articles in academic journals and books about Latin American literature, and the Caribbean, and has worked as an interpreter and translator.

E-MAIL: vescobar@faculty.ie.edu

OFFICE HOURS: by appointment (please email to schedule an appointment with a minimum of 48 hours in advance)

OTRAS INFORMACIONES

COURSE POLICIES

ATTENDANCE (classes, exams)

Students MUST attend all live classes (live in-person or live online).

Students must use their laptop in all live classes, turn on their camera and use earphones in order to facilitate a dynamic class environment. If a student has a particular situation on a given day or in general, they must communicate with their professor to manage any exceptions to this rule.

If you must miss a class, it is your responsibility to advise the professor and provide an explanation or documentation to justify your absence (when possible previous to the class meeting, either in person or via e-mail). In some cases, students may be given the opportunity or are required to complete session work in order to be prepared for the next class and earn the corresponding points despite their absence.

Any work due must be turned in even if you miss class!

Please note that if you are absent to more than 30% of live classes (live in-person and live online sessions) you will get a 0 grade and FAIL the course.

FINAL PRESENTATION

Final presentation date, session 15, is set by the university and is non-negotiable. Lack of justified absence by official authority will result in a grade of 0.

ADD/DROP DEADLINE

Per the Registrar, the official end of the add drop period is 20% of course sessions.

The last day to drop language courses of 15 sessions per semester is session 3.

ASSIGNMENT SUBMISSIONS

Required assignments must be submitted via the platform indicated by the professor on the due date. Late work may or may not be accepted. As all assignments are posted on IE Campus, students are responsible for all work (even if they are not in class). Assignment submissions and required materials adapt to your team/group.

REQUIRED MATERIALS

All students that wish to be enrolled in this class MUST have their own copy of the material required in the Bibliography section below (and the online access that the Premium edition provides) by the 3rd session of class. Failure to do so may result in negative marking towards the final grade at the Professor's discretion.

PUNCTUALITY

"Punctuality is the politeness of princes" and it is also expected of you! Classes will start at the time scheduled.

NOTE: If you arrive more than 5 minutes late to class, this will count as one absence. The same applies if you leave early from class.

USE OF ELECTRONIC DEVICES DURING CLASS

The use of electronic devices (smartphones, phones, tablets, computers, etc.) is only permitted for class activities and tasks. It is not allowed to use electronic devices during class time for personal use. The use of electronic devices for any reason other than class activities and tasks will have a negative effect on your grade.

ACTIVE CLASS PARTICIPATION

Active class participation means that the student is present in class during the whole session, ready with the book and class material ready. An active participation during class also entails participating in all class activities, and exercises. This also includes having prepared any work asked by the professor for each class, as well as the work assigned to be done during class time. A student that does not do this and/or that is doing something else during class time that has nothing to do with the class will see this reflected in their grade.

EU DIGITAL POLICY - TECHNOLOGY AND GEOPOLITICS

IE University
Professor: **RAQUEL ESTHER JORGE RICART**

E-mail: rjorge@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

Students should have basic familiarity with international relations theories and European Union affairs, as well as a personal interest in the **interplay of emerging technologies with traditional drivers of global power**, from politics and economics to human rights. No technical skills are required and will not be taught. **This is a social sciences course on the geopolitics of technology by the European Union**. Students will learn about it in a dynamic way.

SUBJECT DESCRIPTION

In the 21st century, global competition and leadership over technology has risen as a prominent topic in the international arena. The technology rivalry between China and the United States, the disruption of global supply chains due to large dependences on technological components around the world from both the Global South and North, the impact of technology on the understanding of human rights, or the much-needed adaptation of multilateral institutions to address the influence technology wields in global power are just some of the many examples which shed light on the importance of approaching technology from a geopolitical perspective -and not only as a technical issue.

On this, the European Union faces a number of challenges that must be addressed in a well-equipped manner. The stakes in the global tech race are high and the EU needs to catch up to gain leadership and have a global impact on economic development, security and the values-based international order.

This course provides **conceptual, methodological and practical tools to understand how technology is becoming a new driver of geopolitics, and particularly how the European Union is responding to it**. Due to the early nature of the issue and the lack of a large amount of theoretical background on the issue, the course is aimed at providing knowledge on the **impact of technology on the global order** (from security and economics to human rights) and comes with practice-oriented activities, including **case studies, simulations and tasks oriented to acquire skills and knowledge on how to provide grounded policy recommendations from different perspectives** (e.g. as a political party, as a diplomatic service, as a consultancy firm, as the public policy department from a technology company). To this end, the course will explain the "what" (topics that must be taken into account to understand EU's technology policy) and the "how" (techniques, transformations of the international order).

OBJECTIVES AND SKILLS

Upon successful completion of this course, students should be able to:

1. Understand, define and describe the nature, scope and relevance of current, state-of-the-art knowledge on the impact of technology on the global order from the perspective of security, economy and rights.

2. Analyse and evaluate the role of the European Union in this specific topic, and the transformations that technology may impinge on the European Union itself.

3. Gain the conceptual and methodological tools to assess how international policy processes are affected by emerging and disruptive technologies.

4. Develop cross-discipline skills to combine areas of study which have not been traditionally linked.

5. Apply and frame the information into sound knowledge and responses to the targeted goal, topic and audience.

6. Building critical thinking on how to distinguish objective from subjective information, and on how to understand stakeholders' interests on the geopolitics of technology through the case of the European Union.

Students are expected to use appropriate methodologies and analytical techniques in their papers and tasks, and develop rigorous arguments appropriate to the intended audience.

Also, this course is participation-driven, which means students are encouraged to interact in class individually and in groups. I would strive to make everybody feel safe and included during our class and online interactions. Different positions are always welcomed and encouraged provided they are delivered in a respectful manner.

METHODOLOGY

Some reading is to be envisaged, although not on an extensive scale. The course will be practice-oriented with a balance between teaching and practical activities, including case studies and small "policy tasks", both individually and in group, and encouraging proactive participation and open debate. The course might include external guests via online, if necessary.

Teaching

Teaching includes:

- A number of academic literature.
- Mostly, policy documents and analysis from think tanks.
- Tools to assess information and frame it into knowledge: maps, databases, dashboards. These will be useful for case studies and tasks to be carried out.

Discussions

Discussions are based on teaching classes. Some discussions will be open-ended on the general impacts of technology on the global order and others will revolve around specific policies developed by the European Union.

Exercises

Exercises will include:

- Case studies: to be proposed by the lecturer and also students. Case studies will use a specific topic or application domain of technology in the EU to understand the multi-dimensional effects it has.
- Simulation: The course will include one (1) simulation on the negotiation over a topic of EU's foreign policy which is affected by some technology. Students will be assigned a specific

position to be developed.

Group work

Students will be encouraged to work in groups to develop fruitful discussions in class after the lectures, and also to reflect on case studies.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	32.0 %	24 hours
Discussions	16.0 %	12 hours
Exercises	20.0 %	15 hours
Group work	16.0 %	12 hours
Other individual studying	16.0 %	12 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Technology as a driver of the international order

Basic approach to the understanding of technology as a new condition in the shaping of geopolitics. Definition, nature and scope of the issue.

Required readings:

Article: Weaponized Interdependence: How Global Economic Networks Shape State Coercion (International Security, 44 1, 42-79) (CED)

Working Paper: Global Technology Governance Report 2021 (World Economic Forum) (Optional)

SESSION 2 (LIVE IN-PERSON)

Main actors in the global technological competition

China-US technology rivalry. The role and positioning of the European Union. Specific factors explaining the rise of China technologically and current state of competition. A patchwork of factors to be taken into account: trade, security, image, soft power.

Required readings:

Article: The Sino-American race for technological leadership (War on the Rocks)

Article: U.S.- China Technological "Decoupling": A Strategy and Policy Framework (Carnegie Endowment)

Article: The Innovation Wars: America's Eroding Technological Advantage (Foreign Affairs, 100, 2 March/April 2021) (CED)

Article: The Great Tech Rivalry: China vs the U.S. (Belfer Center, Harvard University; 1-5 (the rest of the document is not mandatory) (CED)

SESSION 3 (LIVE IN-PERSON)

The role of technology companies and responses by actors such as the European Union

Are Big Tech companies geopolitical actors? How should countries address the challenges and opportunities private companies pose for their political, economic and social stability? Different approaches to technology companies across the planet as drivers of politics.

Required readings:

Article: The Technopolar Moment: How Digital Powers Will Reshape the Global Order (Foreign Affairs, 100, 6 November/December 2021) (CED)

Article: Big Tech Won't Remake the Global Order (Foreign Policy) (CED)

Article: From SpaceX to Apple, Google and Twitter – here's how Big Tech is trying to help Ukraine against Russia (BusinessInsider) (Optional)

Group exercise: Big Tech companies' actions during the invasion of Ukraine in 2022.

SESSION 4 (LIVE IN-PERSON)
The role of Global South countries and transnational networks

Debate on how to engage countries from the Global South. Role of growing transnational networks and NGOs campaigns over the impact of technology on international regimes.

Required readings:

Article: The Global South Is Redefining Tech Innovation (Wired) (CED)

Article: The Digital Silk Road: Expanding China's Digital Footprint (Eurasia Group)

Article: The role of trust as a new driver for global cooperation on technology: the case of Latin America with Spain and Korea (Elcano Royal Institute) (Optional)

SESSION 5 (LIVE IN-PERSON)
The European Union's technological leadership mindset

Evolution of the European Union's ambition to gain technological leadership. Institutional history and discourse shifts in technology affairs. Debate on technological strategic autonomy "versus" technological sovereignty.

SESSION 6 (LIVE IN-PERSON)
The European Union's technological capabilities

Analysis of main strengths and weaknesses of the European Union by technology, by area, by hurdle (economic, political, institutional, cultural).

Required readings:

Article: Europe's Capacity to Act in the Global Tech Race (German Council on Foreign Relations, 1-19, 39-41) (DGAP)

Case study (by groups, in-class, brief presentation): Comparative advantages and disadvantages by the EU in certain technology compared to China and the United States. Based on data from the DGAP report.

SESSION 7 (ASYNCHRONOUS)
How has the EU's economy and trade policy changed with technology?

From the Single Market to the Digital Single Market. Macrotrends of transformation. The US-EU Trade & Technology Council, Russia, EU-China Comprehensive Agreement on Investments (CAI). Digital Compass and the Digital Decade.

Required readings:

Article: The decoupling of Russia: European vulnerabilities in the high-tech sector (Bruegel)

Article: The US-EU Trade and Technology Council (TTC): State of Play, Issues and Challenges for the Transatlantic Relationship (Summary, 14-23) (EsadeEcPol)
Article: Rethinking the U.S.-EU Trade and Technology Council After Ukraine (The National Interest) (Optional)

SESSION 8 (ASYNCHRONOUS)
Technology as a transforming tool of EU's industrial policy: shifts and new perspectives
A renewed industrial policy. Geopolitical perspectives. Technology as a catalyst of further policies on dependences and acknowledgement of vulnerabilities. Industrial Alliances. A return to subsidy races?
Required reading:

Working Paper: Strategic dependencies and capacities (Commission Staff Working Document, 30-41) (European Commission)

SESSION 9 (LIVE IN-PERSON)
GROUP PRESENTATION - PRACTICE
What is at stake for EU's leadership in a certain key technology for global power, based on an analysis of dependencies on third countries and capacities.

SESSION 10 (LIVE IN-PERSON)
The EU's technological approach to security and defence (I)
Evolution and transformations of the EU's Common Security and Foreign Policy, in both the civilian and military domains. Challenges to the EU's Cyber Diplomacy Toolbox. The 2022 Strategic Compass.
Required readings:

Article: The EU's Rise as a Defense Technological Power: From Strategic Autonomy to Technological Sovereignty (Carnegie Europe)
Working Paper: Understanding the EU's approach to cyber diplomacy and cyber defence (European Parliamentary Research Service)

SESSION 11 (ASYNCHRONOUS)
The EU's technological approach to security and defence (II)
Innovation in defence. The European Defence Agency. Challenges to EU-NATO cooperation on technology. Emerging topics on technology & security and defence.
Required readings:

Article: Innovation as Adaptation: NATO and Emerging Technologies (GMF)
Article: NATO sharpens technological edge with innovation initiatives (nato.int)

SESSION 12 (LIVE IN-PERSON)
PRACTICE - SIMULATION

Simulation on a cyber attack to EU's critical infrastructures. The goal is for students to provide policy and diplomatic responses and strategies to address the impacts of the cyber attack on security, economic and social dimensions. Students will simulate to come from different organizations (European External Action Service, Ministry of Foreign Affairs from a Member State, technology company, NGO...) and they will need to negotiate on a common diplomatic, multistakeholder response.

SESSION 13 (LIVE IN-PERSON)

Addressing inequalities and rights in the technological era: the EU's outlook

How the EU is addressing the impact of technology on inequalities and rights. Freedom on the Internet. Digital repression in developing countries. Charter of Digital Rights. Social perception.

Required readings:

Article: Freedom on the Net 2021 Report (Freedom House)

Working Paper: Digital technologies as a means of repression and social control (4-9, 14-32)
(European Parliament)

Other recommended resources are Ranking Digital Rights, or AI Surveillance Index from Carnegie Endowment.

SESSION 14 (LIVE IN-PERSON)

The EU's technology policy as a new tool of diplomacy and global influence

A limited, but growing diplomatic approach to the technological era. Global Gateway, Digital Partnership Agreements with Asian countries, Digital4Development Hub. United Nations Roadmap on Digital Cooperation.

Required readings:

Article: Revamping the EU's Technology Partnerships (DirectionsBlog; EUCyberDirect)

Article: The geopolitics of technology: How the EU can become a global player (European Council on Foreign Relations)

SESSION 15 (LIVE IN-PERSON)

Group Presentations: Future challenges to EU's technology geopolitics

Discussion on emerging topics that can arise, and factors to be taken into account by the EU as a prominent technological bloc. Some examples of freely chosen topics: metaverse, undersea cables, crypto-communities, technologically ultra-enhanced military operations...

EVALUATION CRITERIA

a) Two group presentations:

- **EU's leadership over a specific technology** (group presentation - 10 minutes): oral presentation on a brief analysis on main dependencies on third countries and capacities to develop a certain technology from a strategic autonomy perspective. Session 9. Score: **15%.**
- **Future 'Mad' Challenge** (group presentation - 10 minutes): oral debate on an emerging topic that the group considers will be significant for the global order, such as the metaverse, undersea cables or super-soldiers, and how the EU should respond to it based on lessons from class. Session 15. Score: **10%.**

b) Individual presentation - Crisis Scenario Simulation (15%):

Simulation on a cyber attack to EU's critical infrastructures. The goal is for students to provide policy and diplomatic responses and strategies to address the impacts of the cyber attack on security, economic and social dimensions. Students will simulate to come from different organizations (European External Action Service, Ministry of Foreign Affairs from a Member State, technology company, NGO...) and they will need to negotiate on a common diplomatic, multistakeholder response.

c) Class Participation (20%).

d) Final Research Paper (40%):

Double-spaced 3000-word research paper on a specific challenge the European Union faces vis-à-vis technology. Student will consult with the professor how to frame the topic. Students are encouraged to select a case study so that they may assess how all domains of technology (security, economy and rights) are affected.

Please note that all students must pass each of the evaluation criteria. Students will pass every criteria when marks are above 50% out of 100%.

Criteria	Percentage	Comments
Final Exam: Research Paper	40 %	
Group Presentation 1 (Session 9)	15 %	
Crisis Scenario Simulation	15 %	
Future 'Mad' Challenge (Session 15)	10 %	
Class Participation	20 %	

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade. Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today´s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goal 16 and 17. Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

In-person attendance is mandatory at IE University, as it is an essential factor of IE´s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session.

Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other cases of force majeure, are to be consulted with the Program Management (bir.biemadrid@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

For more information about the university attendance policy, please check; https://www.ie.edu/student-guide/bir/policies-and-guidelines/attendance/

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

- The retakes will consist of a comprehensive exam or equivalent assignment. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.
- Dates and location of the retakes will be posted in advance and will not be changed.
- The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **RAQUEL ESTHER JORGE RICART**

E-mail: rjorge@faculty.ie.edu

Raquel Jorge is Policy Analyst at Elcano Royal Institute working on the technology and digital agenda. As a former Fulbright Fellow granted by the United States-Spain Fulbright Commission, she holds a Master's in Security Policy, with a concentration in technology and cybersecurity, from the Elliott School of International Affairs at the George Washington University (Washington, DC). She also holds a MA degree in International Relations from Universidad Autónoma de Madrid, and a Double Bachelor on Sociology and Political Science and Public Administration from Universidad de Valencia (Spain) and Université Paris X (Paris, France).

She has worked as expert consultant for the European Commission on the Coordinated Plan on Artificial Intelligence. She previously worked on the planning process of the National Strategy on Technology and Global Order, at Spain's Ministry of Foreign Affairs, European Union and Cooperation, through a technical assistance contract. Before, she worked on policy projects at Harvard University's Berkman Klein Center for Internet & Society, and at a consultancy services firm based in the United Kingdom on foresight methodologies addressed to governments and international organisations. She has worked as consultant for several public, private and social sector entities in Spain, France and the United States, and she has similarly advised in technology issues to Permanent Delegations to the EU.

She is part of the Younger Generation Leaders Network at the European Leadership Network, whose main members include former Prime Ministers, Ministers, and representatives from the EU. She has been named as one of Emerging Young Leaders across Europe in the "35 Under 35" List from Santander Bank-CIDOB. She collaborates with media and regularly appears as speaker in events.

OTHER INFORMATION

Students are encouraged to attend office hours. Unless otherwise stated, each student will agree with the professor on a specific timeslot.

CODE OF CONDUCT IN CLASS

1. Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.
2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.
3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).
4. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".
5. Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".
6. No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.
7. Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

Contact details: rjorge@faculty.ie.edu

FASHION, COSTUME AND TRENDS IN SOCIETY

IE University
Professor: **CRISTINA NUALART**

E-mail: cnualart@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

None

SUBJECT DESCRIPTION

It is evident that attire plays an important role in signalling codes of belonging, and that clothing does more than merely protect the body from the elements. The meaning of the cultural expressions associated with dress and bodily decoration can be interpreted from humanistic and sociological lenses. This course proposes tools to analyze the symbolic attributes of dress in a given society, and to explore the emergence of fashion trends as historical phenomena. The overall aim is to gain an appreciation of the multiple readings that can be garnered from how humans approach dress. Critical observation of clothes through visual documents including film, art, photography and advertising, along with discussion of the course readings, will help gain a better understanding of the work of fashion historians, illustrators, designers and brands. Class activities and assignments will also explore evolving social values around costume, along with ideas surrounding erotic capital, the body, and environmental and economic concerns.

OBJECTIVES AND SKILLS

Upon completion of this course, the successful student will confidently be able to converse on some of the key events in clothing history, and relate forms of dress to social norms and customs. Students will understand some of the diverse uses and meanings of attire –and by extension of personal appearance— with an appreciation of different cultural and contextual perspectives.

Students will hone research competencies and exercise the following abilities:

·   Critically analyze and draw connections between the material elements of dress and wider issues (e.g. power relations).

·   Evaluate and contrast arguments on the role of clothing as a component of cultures across the world.

·   Summarize and synthesize ideas, and articulate reasoned opinions on historical, sociological and philosophical perspectives on fashion, costume and trends.

METHODOLOGY

The content of this course is introduced through lectures, readings and occasional videos. Each topic will be explored with class discussion and other activities – such as group work or creative explorations. Some topics will be further developed through assessed presentations in class, in such a way that students will share their self-directed learning with their peers.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	16.0 %	12 hours
Discussions	16.0 %	12 hours
Exercises	13.33 %	10 hours
Group work	21.33 %	16 hours
Other individual studying	33.33 %	25 hours
TOTAL	100.0 %	75 hours

PROGRAM

GUEST LECTURES

Please check announcements regularly, as the content scheduled below may be adjusted to accommodate guest speakers. Further changes to the programme may occur due to unforeseen circumstances.

SESSION 1 (LIVE IN-PERSON)
Course Overview and introduction to the concepts of Fashion, Costume and Trends
Through a discussion on how we perceive and talk about items of clothing, we will introduce the main topics of the course. We will distinguish fashion, costume and trends under the perspectives of academic disciplines such as history, sociology or philosophy.

SESSION 2 (LIVE IN-PERSON)
Museum visit
Madrid's *Museo del Traje* (Costume Museum) is an ideal place to become acquainted with how clothing is displayed, conserved and historized. Please note that the date and time of this visit may differ from the usual class schedule, depending on the museum's availability for group bookings. All information will be posted on Blackboard as soon as practicable. The visit to another museum/venue may be planned instead, if circumstances require.

SESSION 3 (LIVE IN-PERSON)
Sustainability
We begin the course assessing the impact of the fashion industry on planetary sustainability, from environmental, economic and social perspectives, and discussing opportunities for the future.

SESSION 4 (LIVE IN-PERSON)

History of Clothing
This cursory look at the evolution of clothing in different parts of the world gives a taste of the many ways in which garments have developed and been historized.

SESSION 5 (LIVE IN-PERSON)
Student PRESENTATIONS (part 1)
History of Fashion
Students will share a short piece of research on a pre-agreed theme, to piece together the most salient developments of fashion during the twentieth century. Depending on student numbers, some presentations may take place at a later date.

SESSION 6 (LIVE IN-PERSON)
Student PRESENTATIONS (part 2)
Fashion Illustration and Ethnography
Learning about imagery created to advertise fashion, and the artistry behind it, this session steers towards the next thematic block of the course, which looks at very different approaches to dress. We will contrast the glamour of fashion in the West with ethnographic representations of dress and the 'other'.

SESSION 7 (LIVE IN-PERSON)
Student PRESENTATIONS (part 3)
Dress and Gender
From laws that prevent people of a given sex from wearing certain clothes, through feminist critiques of fashion, we arrive at debates on so-called erotic capital.

SESSION 8 (ASYNCHRONOUS)
Orientalism
The colonial domination of the 19th century used culture as one of its weapons. The representation of bodies and costumes in orientalist artworks lead us to explore the notion of Orientalism –as proposed by Edward Said– and discuss its currency in relation to contemporary dress.

SESSION 9 (LIVE IN-PERSON)
Racialised Peoples and Indigenous Fashion
From fashion design or marketing blunders to alleged discrimination of racialised peoples, this sessions takes us to question cultural belonging and stereotypes.

SESSION 10 (LIVE IN-PERSON)
Modesty? Veils, balaclavas and burkinis
We debate how the symbolic aspect of certain wearable items, including indigenous clothing, has been politicized or used as a form of resistance.

SESSION 11 (ASYNCHRONOUS)
Luxury
In past times, sumptuary laws attempted to control conspicuous consumption, and in recent times luxury brands do not seem to be going out of fashion.

SESSION 12 (LIVE IN-PERSON)

Group Project PRESENTATIONS (part 1)
Starting from this session onwards, some groups will present their Collaborative Group Project.

Subcultures and trends
In his book *Subculture: The Meaning of Style* (1978), Dick Hebdige wrote about urban groups such as teddy boys and punks. In this session, we extend those ideas to other phenomena (goths, cosplay in Tokyo's Harajuku or Shibuya districts, etc.) to discuss how dress styles constitute elements of transgression, identity formation, or instruments for fitting in and belonging.

SESSION 13 (LIVE IN-PERSON)

Group Project PRESENTATIONS (part 2)
Decolonising Fashion
What creative, entrepreneurial alternatives can be developed to minimise the damage that the fashion industry has been known to cause?

SESSION 14 (LIVE IN-PERSON)

Group Project PRESENTATIONS (part 3)
From Fashion Photography to Digital Fashion
Following the first decades of the invention of photography, the medium developed certain recognisable "genres", eventually giving rise to the now well-established genre of fashion photography. More recently, technological developments have led to new forms of advertising fashion brands, and "digital fashion" has emerged in online spaces.

SESSION 15 (LIVE IN-PERSON)

Final Exam

EVALUATION CRITERIA

The evaluation of student performance will be based on the following: quality of research done to be presented in class throughout the course; self and peer assessment; a collaborative research project (typically created by a group of 4-5 students); and an open book exam that assesses comprehension of the course debates and readings.

Details of each assignment will be discussed in class, and the instructions will be found on Blackboard.

Criteria	Percentage	Comments
Individual Presentation	20 %	Research presented in class, approx. 8 minutes.
Self and Peer Assessment	15 %	Constructively identify strengths and areas for improvement.

Group Presentation	35 %	There is ONE Group Presentation (35%), requiring individual students to demonstrate their contribution to the collective project. Thus, the grade is split: 20% individual work, and 15% group.
Final Exam	30 %	Assesses comprehension of course debates and readings.

LATE SUBMISSION

Please take note of the submission deadlines (these will be found with the description of each assignment). Assignment grades will incurr a 10% deduction for each day a homework task or assignment is submitted late (up to a maximum of 5 days). However, failure to do the in-class presentations on the agreed date may result in a zero (0) for that assignment, whether individual or group.

ATTENDANCE

In-person attendance is mandatory at IE University, as it is an essential factor of IE's learning methodology. Noncompliance with deadlines for Non-Classroom Learning (asynchronous) activities or assignments will result in an absence for the session.

While we closely monitor attendance on each course, we also consider that our students are responsible adults, able to efficiently manage their own duties and commitments. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that course. This 30% "buffer" is to be used for all type of absences, such as illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students are expected to manage their various needs –along with unforeseen situations that may arise– within that 30% buffer.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, increase the class performance and maximize your participation grade.

If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Prolonged absences due to extreme cases involving emergencies –such as extended hospitalizations, accidents, serious illnesses or other cases of force majeure— are to be consulted with the Program Management (bir.biemadrid@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

For more information about the university attendance policy, please check:
https://www.ie.edu/student-guide/bir/policies-and-guidelines/attendance/

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain a minimum grade of 5 to pass the course. Furthermore, students whose grade for the Final Exam is below 5 will automatically fail the course. Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions (please refer to the information on ATTENDANCE, above). Students who do not comply with the 70% attendance rule will receive a zero (0) on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year). Students who are in their third or fourth attempt must inform the professor during the first two weeks of the course.

The Bachelor's in International Relations seeks to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today's world. For this reason, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goals 5 (Achieve gender equality and empower all women and girls), 8 (Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all), and 12 (Ensure sustainable consumption and production patterns). Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity across numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

PROFESSOR BIO

Professor: **CRISTINA NUALART**

E-mail: cnualart@faculty.ie.edu

CRISTINA NUALART

Cristina Nualart holds a PhD in Art History (Madrid, Spain) and an MA in the Creative Economy (London, UK). She learned the basics of sewing from her tailor grandmother, and as a teenager got hold of a sewing machine to make poorly-patterned but very original clothes. That lead her to study in a Fashion School in Barcelona for a few years, before graduating in Art and Aesthetics (UK).
Her teaching career includes several years as a lecturer and course leader at RMIT University in Vietnam, where she contributed to the Fashion Merchandising Programme.
In Spain she has worked in a well-known art centres and cultural institutions such as Casa Asia. She has given conferences at public universities and several national museums, and developed courses and activities aimed at foregrounding issues of gender and sustainability.
Cristina Nualart is a member of the Asian research group GIA at Complutense University Madrid (Spain), and of the VASDiV (Visual Activism and Sexual Diversity in Vietnam) Research Network (Art and Humanities Research Council/GCRF grant, UK).

OTHER INFORMATION

OFFICE HOURS by appointment. Please write to: cnualart@faculty.ie.edu

COURSE READINGS and relevant material will be indicated on Blackboard in advance of class. These sources will be provided directly on Blackboard, or available through IE library or an online source. In addition to the required readings, students are expected to find their own additional research material. Students are welcome to propose alternatives to the set texts, in particular of relevant sources in minority languages that are not available in English. Please negotiate with your professor if you wish to tailor your required reading list.

ADDITIONAL MATERIALS:

- Patrik ASPERS and Frédéric GODART, 2013, "Sociology of Fashion: Order and Change", *Annual Review of Sociology,* vol. 39, pp. 171-192.

- Enrique BADIA, 2009, *Zara and her Sisters: The Story of the World's Largest Clothing Retailer,* Palgrave MacMillan.

- Deborah BALL, 2010, *House of Versace: the untold story of genius, murder, and survival,*

Crown Publishers.

- Djurdja BARTLETT, Shaun COLE, and Agnès ROCAMORA, 2013, *Fashion Media: Past and Present,* Bloomsbury.
- Pierre BOURDIEU, 1984, *Distinction: A Social Critique of the Judgement of Taste*, Harvard University Press.
- Elspeth BROWN, 2019, *Work! A Queer History of Modeling*, Duke University Press.
- Barbara BROWNIE, 2017, *Acts of Undressing: Politics, Eroticism, and Discarded Clothing*, Bloomsbury.
- Steeve BUCKRIDGE, 2016, *African Lace-Bark in the Caribbean: The Construction of Race, Class and Gender*, Bloomsbury.
- Rikki BYRD, 2017, "In Search of the Good Life: Toward a Discourse on Reading the Black Body in Hip-Hop and Luxury Fashion", *QED: A Journal in GLBTQ Worldmaking*, vol. 4, no. 3, pp. 180-184.
- Catherine DORMOR, 2009, "skin:textile:film", *The Journal of Cloth & Culture*, vol. 6, no. 3, pp. 238-253.
- Catherine DORMOR, 2020, *A Philosophy of Textile: between practice and theory*, Bloomsbury.
- Mia BAY, and Ann FABIAN, 2015, *Race and Retail: Consumption across the Color Line*, Rutgers University Press.
- Anne Anlin CHENG, 2011, "Shine: On Race, Glamour, and the Modern", *PMLA*, vol. 126, no. 4, pp. 1022-1041.
- Yvon CHOUINARD, 2016 [2005], *Let My People Go Surfing*, Penguin.
- Nicholas COLERIDGE, 1989, *The Fashion Conspiracy: A Remarkable Journey Through The Empires Of Fashion*, Harper & Row.
- Peter CORRIGAN, 2008, *The dressed society: clothing, the body and some meanings of the world*, Sage.
- Ivan E. COYOTE and Rae SPOON, 2014, *Gender Failure*, Arsenal Pump Press.
- Arlene DAVILA, 2016, *El Mall: The Spatial and Class Politics of Shopping Malls in Latin America*, University of California Press.
- Christine DELPHY, 2015 [2008], *Separate and Dominate. Feminism and Racism After the War on Terror*, Verso. French speakers may refer to the original 2008 book: *Classer, dominer: Qui sont les autres?*, La Fabrique.
- Joanne ENTWISTLE and Agnès ROCAMORA, 2006, "The Field of Fashion Materialized: A Study of London Fashion Week", *Sociology,* vol. 40, no. 4, pp. 735-751.
- Kate FLETCHER and Lynda GROSE, 2012, *Fashion & Sustainability*, Laurence King.
- Tanisha FORD, 2015, *Liberated Threads: Black Women, Style, and the Global Politics of Soul*, University of North Carolina Press.
- Malcolm GLADWELL, 2002 [2000], *The tipping point: how little things can make a big difference*, Little, Brown and Company. (See chapters 1 and 6, on trends).
- Alison GWILT, 2020 [2014], *A Practical Guide to Sustainable Fashion*, Bloomsbury.
- Judith HALBERSTAM, 2005, *In a Queer Time & Place. Transgender Bodies, Subcultural Lives* , New York University Press.
- Karen Tranberg HANSEN, 2004, "The World In Dress: Anthropological Perspectives on Clothing, Fashion, and Culture", Annual Review of Anthropology, vol. 33, pp. 369-392.

- Mary HARLOW, Cecile MICHEL and Louise QUILLIEN, 2020, *Textiles and Gender in Antiquity: From the Orient to the Mediterranean*, Bloomsbury.
- Anne HOLLANDER, 2016 [2002], *Fabric of Vision: Dress and Drapery in Painting*, Bloomsbury.
- bell hooks, 1992, *Black Looks: Race and Representation*, South End Press.
- Sojin JUNG and Byoungho JIN, 2014, "A theoretical investigation of slow fashion: sustainable future of the apparel industry", *International Journal of Consumer Studies*, vol. 38, no. 5, pp. 510-519.
- Yuniya KAWAMURA, 2004, *The Japanese Revolution in Paris Fashion*, Berg.
- Alice KETTLE and Lesley MILLAR (Eds.), 2018, *The Erotic Cloth. Seduction and Fetishism in Textiles*, Bloomsbury.
- Naomi KLEIN, 1999, *No Logo: Taking Aim at the Brand Bullies*, Picador.
- Gabriel KUHN, 2020, *Liberating Sápmi. Indigenous Resistance in Europe's Far North*, Independent Publishers Group.
- James LAVER. Dress historian James Laver is the author of some influential books on fashion history. All are very readable and come highly recommended.
- Sean METZGER, 2014, *Chinese Looks: Fashion, Performance and Race*, Indiana University Press.
- Madison MOORE, 2018, *Fabulous: The Rise of the Beautiful Eccentric*, Yale University Press.
- PANDIT, AHMED, SINGHA & SHRIVASTAVA, 2020, *Recycling from Waste in Fashion and Textiles: A Sustainable and Circular Economic Approach*, Scrivener.
- Minh-Ha T. PHAM, 2015, *Asians Wear Clothes on the Internet: Race, Gender, and the Work of Personal Style Blogging*, Duke University Press.
- Virginia POSTREL, 2020, *The Fabric of Civilization. How Textiles Made The World*, Basic Books.
- Giorgio RIELLO. Italian speakers may wish to check out books by this scholar, who has published some works in English.
- Daniel ROCHE. French speakers may wish to check out books by this dress historian.
- Elena ROMERO, 2012, *Free Stylin': How Hip Hop Changed the Fashion Industry*, Praeger.
- Stephanie SADRE-ORAFAI, 2016, "Models, Measurement, and the Problem of Mediation in the New York Fashion Industry", *Visual Anthropology Review*, vol. 32, no. 2, pp. 122-132.
- L. Ayu SARASWATI, 2013, *Seeing Beauty, Sensing Race in Transnational Indonesia*, University of Hawaii Press.
- Antwaun SARGENT, 2019, *The New Black Vanguard: Photography Between Fashion and Art*, Aperture.
- Michael Edward STANFIELD, 2013, *Of Beasts and Beauty: Gender, Race, and Identity in Colombia*, University of Texas Press.
- Daniele TAMAGNI, 2015, *Fashion Tribes: Global Street Style*, Harry N. Abrams.
- Richard THOMPSON FORD, 2021, *Dress Codes*, Simon & Schuster.
- Thuy Linh N. TU, 2011, *The Beautiful Generation: Asian Americans and the Cultural Economy of Fashion*, Duke University Press.
- Carol TULLOCH, 2016, *The Birth of Cool: Style Narratives of the African Diaspora*, Bloomsbury.
- Aleit VEENSTRA and Giselinde KUIPERS, 2013, "It Is Not Old-Fashioned, It Is Vintage,

Vintage Fashion and The Complexities of 21st Century Consumption Practices", *Sociology Compass*, vol. 7, no. 5, pp. 355-365.

- Paolo VOLONTÉ, 2019, "Modelling Practice: The Inertia of Body Ideals in the Fashion System", *Sociologica*, vol. 13, no. 3, pp. 11-26.
- Claire WELLESLEY-SMITH, 2015, *Slow stitch: mindful and contemplative textile art*, Pavilion Books.
- Miles.WHITE, 2011, *From Jim Crow to Jay Z: Race, Rap, and the Performance of Masculinity*, University of Illinois Press.
- Elizabeth WISSINGER and Joanne ENTWISTLE (eds.), 2012, *Fashioning Models. Image, Text and Industry*, Bloomsbury.
- Jane E. WORKMAN and Lark F. Caldwell, 2007, "Centrality of visual product aesthetics, tactile and uniqueness needs of fashion consumers", *International Journal of Consumer Studies*, vol. 3, no. 6, pp. 589-596.
- Jane E. WORKMAN and Seung-Hee LEE, 2016, "What do we know about fashion adoption groups? A proposal and test of a model of fashion adoption", *International Journal of Consumer Studies*, vol. 41, no. 1, pp. 61-69.

JOURNALS:

- *Fashion, Style and Popular Culture Journal*, https://ie.on.worldcat.org/oclc/870475989
- *The Fashion Studies Journal*, https://www.fashionstudiesjournal.org/
- *International Journal of Fashion Studies*, https://ie.on.worldcat.org/oclc/1052659502
- *Textile: The Journal of Cloth & Culture*, https://www.tandfonline.com/toc/rftx20/curren
- *Zone Moda* is an open source fashion journal https://zmj.unibo.it/issue/view/917
- *Indumenta* is an annual publication by the Spanish Ministry of Culture, edited by Madrid's Museo del Traje (Costume Museum) https://www.culturaydeporte.gob.es/mtraje-indumenta/numeros.html (articles are mostly in Spanish, but some are in other languages).

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes the following (listed in order of seriousness of the offense):

·   providing faulty sources;

·   copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;

·   copy-pasting material from external sources even while citing them;

·   using verbatim translations from sources in other languages without citing them;

·   copy-pasting material from external sources without citing them;

·   and buying or commissioning essays from other parties.

The professor will advise on how to present said material in assignments. On their part, students are expected to learn how to cite sources correctly, as this is a valuable professional skill. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). Students using external tutorial support should report it to the professor and the BIR Program from the moment they begin receiving this support.

Professors are required to check each student's academic work in order to guarantee its originality. All written assignments will be checked using plagiarism-detecting software such as Turn-it-in or SafeAssign. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel.

Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment, to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

· The retakes will consist of a comprehensive exam or equivalent assignment. The final grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.

· Dates and location of the retakes will be posted in advance and will not be changed.

· The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade is capped at 8 (out of 10).
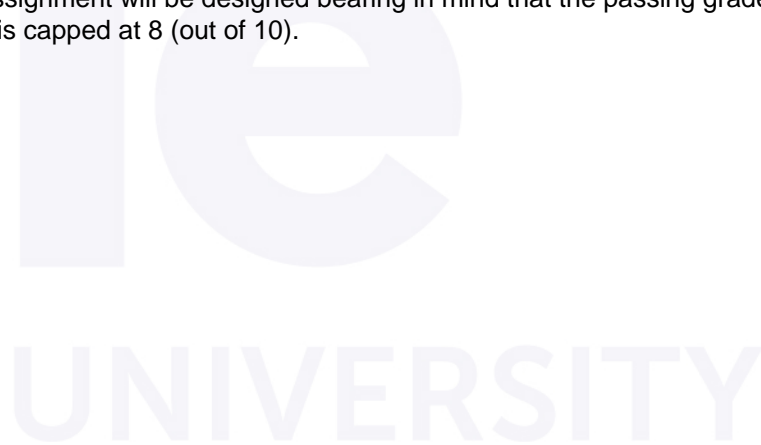
FOREIGN POLICY IN TIMES OF CRISIS

IE University
Professor: **FRANCISCO DE BORJA LASHERAS TINA**

E-mail: flasheras@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

Some knowledge of the main international crises and foreign policy challenges in recent decades, is helpful, as is some background in contemporary history.

SUBJECT DESCRIPTION

Russia's invasion of Ukraine months after the Western pullout from Afghanistan, repression in Belarus, US-China competition, with Europeans in between, climate emergency, hybrid wars…In a world where crises seem the new normal, foreign policy elites struggle to keep a strategic compass while solutions for the world's problems seem wanting. This is the digital age: "crises" pop on and off of our cell phones and screens. Moreover, polarized political dynamics further blur the lines between international affairs and domestic politics.

How do foreign policy decision-makers cope with such crises and conflicts in real time? What are the frames, mindsets and factors shaping their decisions? Realpolitik geopolitics, normative values, or different blends of them all? What can some practical cases over the last decades teach about foreign policy? What are the drivers of domestic politics shaping foreign policy? How do long term objectives cope with the age of social media and 24/7 info? Is it still possible still to do Grand Strategy? And how can Europe fare in this age of geopolitics and chaos?

This course aims to provide tentative answers to these questions, through an unorthodox, dynamic perspective of international relations and foreign policy. The course builds on a mix of foreign policy practice and the challenges at the domestic front that influence this policy, bringing in scholarly notions too. It combines a main -though not exclusive- focus on Europe and its foreign policy challenges, with a number of case studies (based on professor Lasheras' experience, with a certain emphasis on Eastern Europe), drawing lessons learned. That is: from the concrete gradually into grand foreign policy debates.

It is specially aimed at those students that want to undertake a career in foreign and security policy, whether as diplomats, analysts, field workers and/or international officials.

OBJECTIVES AND SKILLS

-Understand (better) some of the main foreign and security policy challenges of our time, starting with key regional security crises and conflicts, past and present, latent or frozen.

-Understand (better) specially how Europeans and Westerners approach modern day foreign policy crises, their caveats and their strengths too.

-Further a critical, thoughtful approach to foreign and security policy, and diplomacy, harnessing some of the skills needed for advisory positions in this subject, as well as for arguing and debating convincingly, not just common place chatter. Some of these skills will enrich the student's training for real life professional challenges, in other disciplines too.

-Analyze contemporary foreign policy and security challenges and cases, juggling through loads of information sources (online webs, podcasts, etc.) and opinions, and applying concepts acquired throughout the course.

-As a result, being able to provide good quality foreign policy advise, ideas and tentative proposals on some of the conflicts and crises of our time.

METHODOLOGY

The course aims to be very interactive (though not a beer hall chat), through the Socratic method of teaching, including cold questions, discussing the materials and issues therein, etc.

It will require doing the readings and consulting the other assigned materials (eg. audiovisuals, etc.) beforehand (some 2/3 hours per week, on average). There will also be ad hoc external contributors and other dynamic elements (e.g. briefings by foreign policy practitioners and scholars).

A good performance and learning in this course thus requires presential attendance - online only in very justified cases per IE rules.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	50.67 %	38 hours
Discussions	20.0 %	15 hours
Exercises	13.33 %	10 hours
Group work	5.33 %	4 hours
Other individual studying	10.67 %	8 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)
A dive into modern foreign policy in a world of chaos and unhinged geopolitics

SESSION 2 (LIVE IN-PERSON)
European foreign policy (policies)

SESSION 3 (LIVE IN-PERSON)
The Balkans (I): war and peace-making

SESSION 4 (LIVE IN-PERSON)
The Balkans (II): reconstruction, state-building and international (dis)engagement, the case of Bosnia

SESSION 5 (LIVE IN-PERSON)
The Balkans (III): political crises, enlargement and "Europe"

SESSION 6 (LIVE IN-PERSON)
Interventionism: from Kosovo to Afghanistan, Libya and Syria

SESSION 7 (LIVE IN-PERSON)
The unraveling of the post Cold War order and stabilocracies in Eastern Europe (I): revolutions and the first war on Ukraine

SESSION 8 (LIVE IN-PERSON)
The unraveling of post Cold War order and stabilocracies in Eastern Europe (II): Belarus and the 2020 war in Nagorno-Karabakh

SESSION 9 (LIVE IN-PERSON)
The unraveling of post Cold War order and stabilocracies in Eastern Europe (III): Russia's renewed invasion of Ukraine

SESSION 10 (LIVE IN-PERSON)
Relations with Russia: lessons learned of a succession of mostly failed policies (1990s-2022)

SESSION 11 (LIVE IN-PERSON)
US foreign policy and transatlantic relations in the XXIst century

SESSION 12 (LIVE IN-PERSON)
US-China competition: a relationship prone to conflict?

SESSION 13 (LIVE IN-PERSON)
The shifting nature of war in the XXIst century: hybrid, conventional warfare...unpeace?

SESSION 14 (LIVE IN-PERSON)
Wrap up: the shifting shape of international community

SESSION 15 (LIVE IN-PERSON)
Workgroup on a practical case

BIBLIOGRAPHY
Recommended

 - Tony Judt. *Postwar: a History of Europe since 1945.* Pimlico. ISBN 9780712665643 (Printed)

- Richard Holbrooke. (1998). *To end a war.* ISBN 0375753605 (Digital)

null
- Andrew Wilson. (2014). *Ukraine Crises: What it means for the West.* ISBN 9780300211597 (Digital)

null
- Jasmin Mujanovic. (2018). *Hunger and Fury: The Crisis of Democracy in the Balkans.* Hurst. ISBN 9781849048927 (Digital)

null
- Timothy Snyder. (2010). *Bloodlands: Europe between Hitler and Stalin.* Vintage. ISBN 9780099551799 (Printed)

null
- Mark Leonard (Editor). (2016). *Connectivity wars:why migration, finance and trade are the geo-economic battlegrounds for the future.* ISBN 9781910118559 (Digital)

null
- Thomas G. Weiss. (2005). *Military-civilian interactions: humanitarian crises and the responsibility to protect.* Second edition. Rowman & Littlefield. ISBN 0742530167 (Printed)

null
- Richard Caplan (Editor). (2012). *Exit strategies and state building.* Oxford. ISBN 9780199760114 (Printed)

null

EVALUATION CRITERIA

There will not be a final exam, but rather a practical, simulation case through workgroups where, in line with the course's objetives, students will play the role of foreign policy advisors in the cabinet of a decision-maker (eg. Foreign Minister, etc.). Additionally, those students who want very good grades can write a short, final foreign policy memo. Grades will also be assessed on the basis of individual engagement throughout the course, showing knowledge acquired, potential skills and pro-activeness.

Criteria	Percentage	Comments
Class Participation	10 %	
Workgroups	40 %	
Individual Work	25 %	
Other	25 %	

PROFESSOR BIO

Professor: **FRANCISCO DE BORJA LASHERAS TINA**

E-mail: flasheras@faculty.ie.edu

Professor Borja Lasheras

Professor Borja Lasheras is a Non-resident Senior Fellow at the Center for European Policy Analysis (CEPA). He had advisory positions at the Spanish Presidency of the Government between 2018 and late 2021, where he held the position of Senior Foreign Policy Advisor (2020-2021). Previously, he was the Associate Director and then Director at the European Council on Foreign Relations (ECFR) office in Madrid. He has extended field experience, having worked for the OSCE's field missions of Bosnia and Albania (2010-2013).

He graduated summa cum laude at Deusto University's Faculty of Law and earned a Master's Degree at Harvard (LL.M. 07). His field of expertise covers European foreign and security policy, national security, Ukraine, Russia, and the Balkans. He authored a book on Bosnia, "Bosnia in limbo: testimonies from the Drina River". He has published in Spanish and international media.

OTHER INFORMATION

Professor Borja Lasheras will be available one hour a week for feedback and course consultations, right after the class.

flasheras@faculty.ie.edu

FRENCH FOR BUSINESS 1 (no native speakers)

IE University
Professor: **EUGÉNIE DEHOUCK**

E-mail: edehouck@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
- French 3.2 / French intermediate
- Placement Test

SUBJECT DESCRIPTION
This course is designed to develop the students' ability to use French accurately and correctly in order to communicate and express their views about a range of topics related to the business area, such as local and international companies, business responsibilities, sustainable development, marketing, and French Tech. Further communicative contexts belonging to professional situations in France and in French-speaking countries are introduced.

COURSE CREDITS ECTS 3

OBJECTIVES AND SKILLS
This course is designed for students working at the B1/B2 level in French. The content in French will work within the established level/s of the Common European Framework of Reference for languages:

- Understand the main points of clear standard speech on familiar matters regularly encountered in work, leisure, college, etc.
- Understand the main point of many radio or TV programs on current affairs or topics of professional interest when the delivery is relatively slow and clear.
- Understand texts that consist mainly of high frequency everyday and job-related language.
- Understand the description and communication of events, feelings and wishes in professional letters and emails, taking into account the written skills needed.
- Deal with most situations likely to arise whilst working in an area where French is spoken.
- Enter unprepared into conversation on topics that are familiar, of personal interest or pertinent to everyday life and work (e.g. family, hobbies, work, travel and current events).
- Connect phrases in a simple way in order to describe experiences and events, dreams, hopes and ambitions.
- Briefly give reasons and explanations for opinions and plans in order to discuss different points of view.
- Write simple connected text on topics that are of professional or personal interest.
- Write letters describing work experience and personal impressions.
In this case, students will work in the French language on tasks specific to sustainability and the environment that align with the established level/s.

METHODOLOGY

The methodology used to teach French for business focuses on a communicative teaching approach. Students will be required to actively participate in all session learning and outside session learning (homework and transversal activities done individually orin groups). Through professor instruction and student-centered learning, students will develop their ability to communicate and express themselves in the target language. A variety of instructional techniques and tools are used, including group or pair work, student presentations, video assignments, ed-tech tools, etc. in order to maximize the practice and development of the four skills of listening, reading, speaking and writing needed to communicate in our modern world.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	48.0 %	36 hours
Discussions	17.33 %	13 hours
Exercises	17.33 %	13 hours
Group work	17.33 %	13 hours
Other individual studying	0.0 %	0 hours
TOTAL	100.0 %	75 hours

PROGRAM

GENERAL ORGANIZATION OF SESSIONS

This elective class has a total of 15 sessions during this semester. These 15 sessions will be organized in the following way, always subject to change at the professor ?s discretion:
- **sessions 1 - 5 > Pitching your business**
- **sessions 6 -10 > Sell your products and services**
- **sessions 11- 14 > Creating a business**
- **session 15 > Final oral and written presentation** (final presentation cannot be changed, please make the necessary arrangements to be present in this session)

The evaluation material will include the following:

- several short oral activities assigned in class
- The final oral and written presentation (session 15) (final presentation cannot be changed, please make the necessary arrangements to be present in this session)

NOTE: It is at the professor ?s discretion to include more evaluations (such as quizzes, essays, IE Campus activities) or change the planned material of a session, always depending on the group ?s learning progress and needs.

SESSION 1 (LIVE IN-PERSON)

Faire connaître son entreprise

Topics and learning objectives:
- Business and social responsibility: defining the role of companies today, balance between making a profit and being responsible (socially, environmentally, ethically)
- Analysis of socially responsible companies
- Present a company: explain how it was created, founders, the sector, achievements, figures (example: LVMH group, etc).

Grammar and Vocabulary objectives:
- Opinion verbs
- Present subjunctive
- Past tense (imparfait, passé composé)
- Temporal discourse markers
- Quantities
- Expressing proportion

SESSION 2 (LIVE IN-PERSON)

Faire connaître son entreprise

Topics and learning objectives:
- Business and social responsibility: defining the role of companies today, balance between making a profit and being responsible (socially, environmentally, ethically)
- Analysis of socially responsible companies
- Present a company: explain how it was created, founders, the sector, achievements, figures (example: LVMH group, etc).

Grammar and Vocabulary objectives:
- Opinion verbs
- Present subjunctive
- Past tense (imparfait, passé composé)
- Temporal discourse markers
- Quantities
- Expressing proportion

SESSION 3 (LIVE IN-PERSON)

Faire connaître son entreprise

Topics and learning objectives:
- Business and social responsibility: defining the role of companies today, balance between making a profit and being responsible (socially, environmentally, ethically)
- Analysis of socially responsible companies
- Present a company: explain how it was created, founders, the sector, achievements, figures (example: LVMH group, etc).

Grammar and Vocabulary objectives:
- Opinion verbs
- Present subjunctive
- Past tense (imparfait, passé composé)
- Temporal discourse markers
- Quantities
- Expressing proportion

SESSION 4 (LIVE IN-PERSON)

Faire connaître son entreprise

Topics and learning objectives:
- Business and social responsibility: defining the role of companies today, balance between making a profit and being responsible (socially, environmentally, ethically)
- Analysis of socially responsible companies
- Present a company: explain how it was created, founders, the sector, achievements, figures (example: LVMH group, etc).

Grammar and Vocabulary objectives:
- Opinion verbs
- Present subjunctive
- Past tense (imparfait, passé composé)
- Temporal discourse markers
- Quantities
- Expressing proportion

SESSION 5 (LIVE IN-PERSON)

Faire connaître son entreprise

Topics and learning objectives:
- Business and social responsibility: defining the role of companies today, balance between making a profit and being responsible (socially, environmentally, ethically)
- Analysis of socially responsible companies
- Present a company: explain how it was created, founders, the sector, achievements, figures (example: LVMH group, etc).

Grammar and Vocabulary objectives:
- Opinion verbs
- Present subjunctive
- Past tense (imparfait, passé composé)
- Temporal discourse markers
- Quantities
- Expressing proportion

SESSION 6 (LIVE IN-PERSON)

Vendre ses produits et ses services

Topics and learning objectives:
- Presenting a product or service : functions, characteristics and utility
- Examples of successful national (French) products: Why are they successful?
- How to position your product in the market: marketing techniques, understanding social networks, advertising (slogans, logos)

Grammar and Vocabulary objectives:
- Comparisons
- Superlatives
- Relative pronouns
- Future Tense
- Expressing hypothesis
- Adverbs of time and space

SESSION 7 (LIVE IN-PERSON)

Vendre ses produits et ses services

Topics and learning objectives:
- Presenting a product or service : functions, characteristics and utility
- Examples of successful national (French) products: Why are they successful?
- How to position your product in the market: marketing techniques, understanding social networks, advertising (slogans, logos)

Grammar and Vocabulary objectives:
- Comparisons
- Superlatives
- Relative pronouns
- Future Tense
- Expressing hypothesis
- Adverbs of time and space

SESSION 8 (LIVE IN-PERSON)

Vendre ses produits et ses services

Topics and learning objectives:
- Presenting a product or service : functions, characteristics and utility
- Examples of successful national (French) products: Why are they successful?
- How to position your product in the market: marketing techniques, understanding social networks, advertising (slogans, logos)

Grammar and Vocabulary objectives:
- Comparisons
- Superlatives
- Relative pronouns
- Future Tense
- Expressing hypothesis
- Adverbs of time and space

SESSION 9 (LIVE IN-PERSON)

Vendre ses produits et ses services

Topics and learning objectives:
- Presenting a product or service : functions, characteristics and utility
- Examples of successful national (French) products: Why are they successful?
- How to position your product in the market: marketing techniques, understanding social networks, advertising (slogans, logos)

Grammar and Vocabulary objectives:
- Comparisons
- Superlatives
- Relative pronouns
- Future Tense
- Expressing hypothesis
- Adverbs of time and space

SESSION 10 (LIVE IN-PERSON)

Vendre ses produits et ses services

Topics and learning objectives:
- Presenting a product or service : functions, characteristics and utility
- Examples of successful national (French) products: Why are they successful?
- How to position your product in the market: marketing techniques, understanding social networks, advertising (slogans, logos)

Grammar and Vocabulary objectives:
- Comparisons
- Superlatives
- Relative pronouns
- Future Tense
- Expressing hypothesis
- Adverbs of time and space

SESSION 11 (LIVE IN-PERSON)

Créer son entreprise

Topics and learning objectives:
- French start-ups : French start-ups successful and unsuccessful examples
- What makes a successful brand?
- Financing companies: business aid and funding
- Entrepreneurs testimonies

Grammar and Vocabulary objectives:
- Discourse markers
- Verbs of sentiment

SESSION 12 (LIVE IN-PERSON)

Créer son entreprise

Topics and learning objectives:
- French start-ups : French start-ups successful and unsuccessful examples
- What makes a successful brand?
- Financing companies: business aid and funding
- Entrepreneurs testimonies

Grammar and Vocabulary objectives:
- Discourse markers
- Verbs of sentiment

SESSION 13 (ASYNCHRONOUS)

The tasks for this asynchronous session will be published on the scheduled date by the professor.

SESSION 14 (LIVE IN-PERSON)

Créer son entreprise

Topics and learning objectives:
- French start-ups : French start-ups successful and unsuccessful examples
- What makes a successful brand?
- Financing companies: business aid and funding
- Entrepreneurs testimonies

Grammar and Vocabulary objectives:
- Discourse markers
- Verbs of sentiment

SESSION 15 (LIVE IN-PERSON)

Final oral and written presentation

Attention: final presentation cannot be changed, please make the necessary arrangements to be present in this session

EVALUATION CRITERIA

Criteria	Percentage	Comments
Active Class Participation	25 %	
Session Work	15 %	
Continuous Evaluation	30 %	Evaluations (oral presentations, essays, quizzes, etc.)
Oral Presentation	20 %	
Written expression	10 %	

Attention: the final presentation on session 15 cannot be changed, please make the necessary arrangements to be present in this session.

Extraordinary Evaluations

The extraordinary evaluation in January will be subject to the following rules:

Students who fail the course will have the opportunity to be re-evaluated in January (unless failure was due to excessive absences, in which case the student loses the right to sit both the regular exam and the extraordinary exam). In subsequent evaluations students who failed due to lack of attendance will be reevaluated in the same manner.

The date and location of the extraordinary evaluation in January will be set and published in advance and CANNOT be changed.

The evaluation will allow the student the opportunity to improve the most deficient portions of their grade in order to pass the course. This may consist of taking an exam or being required to turn in assignments or other evaluations that were not submitted or earned unsatisfactory grades. If assignments must be turned in, the student may either mail them by certified mail by the established deadline or turn them in person on the set date as arranged with the professor.

Once grades are posted, the professor will advise students who failed how to proceed regarding the extraordinary evaluation. The extraordinary evaluation grade (either exam or assignments) will replace the corresponding deficient portion of the final grade, taking into account that the highest grade a student may earn on any of the extraordinary evaluations is 8.0.

PROFESSOR BIO

<div align="center">

Professor: **EUGÉNIE DEHOUCK**

E-mail: edehouck@faculty.ie.edu

Eugénie Dehouck
edehouck@faculty.ie.edu

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My name is Eugénie and I was born in Calais, in the north of France where I studied Spanish Philology. I applied to the Erasmus program in order to spend some time in Spain and it was a remarkable experience for me. I loved Spain so much that I decided to stay one more year working as a French Teaching Assistant in an institute of Alcalá de Henares. There, I discovered that teaching was my passion, so I studied my CAP (Certificado de Aptitud Pedagógica). Then, I worked for 4 years for the Spanish Ministry of Defense as a French teacher and translator. In parallel I have been a French teacher in companies in Spain such as Carrefour, Leroy Merlin, Axa, Alcampo and Aki Bricolage. It was a very good experience and I learnt a lot with the different students I had. Furthermore, I have worked for Vaughan Systems where I headed a team of French writers with whom we published a collection of 51 French books sold as a collection ("Bonjour") with El Mundo. I also wrote two French grammar books addressed to Spanish speaking people. I also worked at Oxford University Press as editor of French to create books for students in secondary school who learn French as a second language. My last work experience has been at Anaya as editor of French to create books and promote them. I have also organized training workshops for teachers of French as a foreign language.

OFFICE HOURS: by appointment (please email to schedule an appointment with a minimum of 48 hours in advance)

OTHER INFORMATION

Note about the Syllabus session schedule:

We reserve the right to improve the student learning experience during the course. Although we aim to keep to the scheduled syllabus, there may be some changes made to the program, based on and in the service of the benefit of the class. Final presentation date, however, will not change.

COURSE POLICIES

Attendance

Students MUST attend all classes.

If you must miss a class, it is your responsibility to advise the professor and provide an explanation or documentation to justify your absence (when possible previous to the class, either in person or via email).

Any work due must be turned in even if you miss class!

Please note that if you are absent from more than 30% of classes you will get a 0 grade and FAIL the course.

Punctuality

"Punctuality is the politeness of princes" and it is also expected of you! Classes will start at the time scheduled.

NOTE: If you arrive more than 5 minutes late to class, this will count as one absence. The same applies if you leave early from class.

ADD/DROP DEADLINE

Per the Registrar, the add/drop period ends on the 3rd session of our language class.

ASSIGNMENT SUBMISSIONS

Required formal assignments must be submitted via the platform indicated by the professor on the due date. Late work may or may not be accepted. As all assignments are posted on IE Campus, students are responsible for all work (even if they are not in class).

Cell Phones/ Smartphones/ Tablets / Laptops

As the use of cell phones/ smartphones as well as laptops during class is disruptive and distracting when not used as a learning tool in our class, it is permitted ONLY at the discretion of the professor. In Face to Face classes, the professor reserves the right to confiscate those devices used in class for personal purpose and hand them back only at the end of class; and in video conference classes, the professor could mark an absence if the student is distracted with her or his cellphone or other activities non class related.

MATERIAL

We will use material from a series of books designed for French for business. Your professor will pass the material to the students throughout the semester. Each student is responsible to be in class with all the assigned and required material. Failure to do so may result in negative marking towards the final grade at the Professor's discretion, or the student may be asked to leave the classroom, and therefore have an absence.

As a bibliographic reference, the main books for this material will be the following (remember, you do not have to buy the books).

Title: Affaires étrangères Niveaux B1/B2
Authors: Nathalie Calvet, Bernadette Coulomies-Friscic, Aurélie Daoulas, Hélène Nguyen-Gateff
Editorial / Year: Clé International 2020
ISBN : 978-2-09-038692-9

Title: Edito Pro B1 Français professionnel
Authors: Amandine Diogo, Meryl Maussire, Manon Giraud, Bertrand Lauret
Editorial / Year: Didier 2020
ISBN : 978-2-09-038663-9

Title: Objectif Express 2
Authors: Anne-Lyse Dubois, Béatrice Tauzin
Editorial / Year: Hachette 2016
ISBN / EAN : 9782014015751

Title: Quartier d'Affaires B1
Authors: Delphine Jégou, MP Rosillo
Editorial / Year: Clé International 2014
ISBN : 978-2-09-038663-9

Title: Vocabulaire progressif du français des affaires
Authors: Jean-Luc Penformis
Editorial / Year: Clé International 2004
ISBN : 209-033803-2

GASTRONOMY:THE ART AND POLITICS OF EATING

IE University
Professor: **FLOR DE LOURDES GRAGERA DE LEON CANTERO**

E-mail: fgragera@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

None.

SUBJECT DESCRIPTION

The search for food and the rituals around it have governed human history, from prehistoric times until the present. In this course, we will undertake a cultural and historical journey across different civilizations and eras, to understand food's significance. We do like eating, but, in what ways has food shaped identities, cultural and political relations and forms of globalization? To look for answers to this question, we will travel the world borrowing manifold lenses: history, art, literature, cinema, religion, and the language of advertising will lead us along the way. We will explore several landmarks in food history: food's role in creating civilization in the agricultural revolution; the search for spices and luxury ingredients that led to explore the world, and to create the first 'globalizing' trends in ingredients and cuisine; the birth of French Haute Cuisine together with the emergence of the first restaurants and gastronomy tradition; migrant food, and the phenomenon of fast food. We will look at how cinema, art and literature have contributed to create cultural and political discourses around food, as well as memory. We will analyze rituals, restrictions, fasting and diets that serve to establish spiritual and community alliances around religion.

OBJECTIVES AND SKILLS

At the end of this course, participants will acquire:

Content-based

- Acquisition of greater familiarity with food history and food studies;
- A better understading of how the concept of gastronomy has been constructed and of its impact today;
- A deeper knowledge of food's role in culture and society.

Skill-based

- Understanding of the relevance of food in shaping humankind history, and as a catalyst that runs throughout times;
- Ability to analyze the political, social and transnational relevance of food across times;
- A deeper insight on how food is linked to art, literature and movie as a cultural phenomenon and as an expression of power;
- A broad perspective of the major and most influential culinary traditions;
- A critical view on food as a mass industry and as a cultural popular phenomenon.

In our highly changing world, courses on the humanities offer basic and well-established anchors that will help you carry out a more in-depth analysis of the reality you live in. Humanities foster critical thinking and will provide you with the necessary tools to both analyze the ideas of others and defend your own. This course focuses on meaning and understanding, and will provide you with the necessary knowledge not just to understand the world around you but also the skills to construct and defend your own ideas. In a global and interconnected world, it is important to be able to discriminate and think critically about the endless amount of information you are exposed to. In order to achieve this goal, you will need to undertake wide-ranging readings of complex texts where you will learn how to analyze, interpret, discuss them in order to form an informed opinion of the work. Writing assignments, which are a good way to order one's thoughts and reflect on your readings will also form part of your homework.

METHODOLOGY

The course will be taught employing IE's Liquid Learning methodology, which combines three essential elements for a complete and dynamic learning experience: synchronous interactions, asynchronous interactions and individual inquiry and discovery. Synchronous Interaction is learning that happens in live, in real-time. For example, attending classes (lectures, discussions, labs, studios) in-person or virtually, working with classmates on team projects in a work-room or video-conference platform, or getting help and feedback from professors in-person or online. Asynchronous Interaction and Individual Inquiry and Discovery are learning experiences that happen interactively and asynchronously using collaboration tools and digital platforms.

The professor is expected to:

- Combine classes in the form of discussions, exercises and teamwork, based on selected readings and viewings.
- Moderate debates based on the analysis of some sequences of the audiovisual materials proposed or on the course readings.
- Give tutorial support off-line and on-line to develop the analytical and practical assignments, both individually and in groups.
- Provide the students with extra materials.

The students are expected to:

- Read and reflect about the selected bibliography, videography and multimedia works.
- Participate actively and meaningfully in the debates and team activities.
- Work on the individual and the team assignments.

A variety of instructional techniques and tools will used during this course, including lectures and presentations, discussions in groups or pair work, debates on the assigned readings, video presentations, forum discussions, ed-tech tools, etc. in order to maximize the development of the skills.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15 hours
Discussions	13.33 %	10 hours
Exercises	26.67 %	20 hours
Group work	6.67 %	5 hours

Other individual studying	33.33 %	25 hours
TOTAL	100.0 %	75 hours

PROGRAM

CORE TOPICS

History of Food

Introduction to Gastronomy

Cultural perspectives on food: art, literature, cinema, religion and publicity

Food as industry

Food justice

SESSION 1 (LIVE IN-PERSON)

Introduction to the course: objectives, contents, schedule, and evaluation systems. Digital resources and platforms that we will use during this course, and how the synchronous and asynchronous sessions will work.

Preliminary discussion: A Food Brainstorm. What food represents for you? (More guidelines for this discussion will be provided). Discussion as a class, and in small groups. Kahoot.

SESSION 2 (LIVE IN-PERSON)

Contents: Tracing back the history of humankind's relationship to food (I).

The ingredients of the day.

Lecture/Debate+ group activities

Discovery (video and/or presentation/short text): Innovators, innovations and culinary trend setters.

Pre-Work. Please read:

Book Chapters: 'History's Biggest Fraud' in Sapiens by Yuval Noah Harari. Chapter 5. (ced)

Book Chapters: 'The Humanization of Eating Behaviors' in Food. A Culinary History from Antiquity to the Present by Jean-Louis Flandrin, ed. Pages 38-44. (ced)

Technical note: 'Anthropology of Food' in The Oxford Handbook of Food History by Jeffrey M. Pilcher. Pages 169-180. (ced)

SESSION 3 (LIVE IN-PERSON)

Contents: Tracing back the history of humankind's relationship to food (II).

The ingredients of the day.

Lecture/Debate+

Activity: Group work in pairs to choose a famous chef around the world. Presentations and discussion as a class.

Discovery (video and/or presentation/short text): Innovators, innovations and culinary trend setters.

Pre-Work. Please read:

Book Chapters: 'The Culture of the Symposium' in Food. A Culinary History from Antiquity to the Present by Jean-Louis Flandrin, ed. Pages 136-144. (ced)

Technical note: 'The Good Things That Lay at Hand. Tastes of Ancient Greece and Rome' in Food. The History of Taste by Paul Freedman, ed. Pages 80-92. (ced)

SESSION 4 (ASYNCHRONOUS)
Watch a film from the list provided at the end of the syllabus.
SHORT ASSIGNMENT 1 (10 points): Write a short paper (500 words minimum, to be submitted via Turnitin in BB) analyzing the perspective from which it presents food as a theme: whether historical, artistic, practical, emotional, literary, etc (several can be combined). You may answer questions such as: What is the function and importance of food so the story can be narrated? Why food matters for the story? How is it represented through filmic language? More guidelines will be offered upon student's request. **Due on session 5.**

SESSION 5 (LIVE IN-PERSON)
Contents: Tracing back the history of humankind's relationship to food (III).

The ingredients of the day.

Lecture/Debate+

Activity: Video (TBA); discussion in the Campus Forum with the questions that will be provided in order to discuss the video.

Discovery (video and/or presentation/short text): Innovators, innovations and culinary trend setters.

SHORT ASSIGNMENT 1 DUE

Pre-Work. Please read:

Book Chapters: 'Feasting and Fasting. Food and Taste in Europe in the Middle Ages' in Food. The History of Taste by Paul Freedman, ed. Pages 146-160. (ced)

Book Chapters: 'New Worlds, New Tastes. Food Fashions after the Renaissance' in Food. The History of Taste by Paul Freedman, ed. Pages 174-196. (ced)

Book Chapters: 'Colonial Beverages and the Consumption of Sugar' in Food. A Culinary History from Antiquity to the Present by Jean-Louis Flandrin, ed. Pages 495-508. (ced)

SESSION 6 (LIVE IN-PERSON)
Contents: Tracing back the history of humankind's relationship to food (IV).

The ingredients of the day.

Lecture/Debate+

Activity: reading and discussion of short texts as a class and then, in small groups.

Discovery (video and/or presentation/short text): Innovators, innovations and culinary trend setters.

Pre-Work. Please read:

Book Chapters: 'The Birth of the Modern Consumer Age. Food Innovations from 1800' in Food. The History of Taste by Paul Freedman, ed. Pages 203-208; (ced)

Book Chapters: 'The Birth of the Modern Consumer Age. Food Innovations from 1800' in Food. The History of Taste by Paul Freedman, ed. Pages 211-217 (ced)

Book Chapters: 'The Birth of the Modern Consumer Age. Food Innovations from 1800' in Food. The History of Taste by Paul Freedman, ed. Pages 219-223 (ced)

Book Chapters: 'The Birth of the Modern Consumer Age. Food Innovations from 1800' in Food. The History of Taste by Paul Freedman, ed. Pages 225-231. (ced)

SESSION 7 (ASYNCHRONOUS)

Watch a film from the list provided at the end of the syllabus.

SHORT ASSIGNMENT 2 (10 points): Write a short paper (500 words minimum, to be submitted via Turnitin in BB) exploring and discussing the relationship of the main characters with regard to food, looking at the following aspects: whether they are defined by it, how food creates a conflict for the characters or, rather, solves it, how food make the characters' story move forward. More guidelines will be offered upon student's request. **Due on session 8.**

SESSION 8 (LIVE IN-PERSON)

Contents: What is gastronomy? Understanding the art of food (I).

The ingredients of the day

Lecture/Debate+

Activity: In search of the most famous restaurants in the world. Who says so? Research and individual discussion.

Discovery (video and/or presentation/short text): Innovators, innovations and culinary trend setters.

SHORT ASSIGNMENT 2 DUE

Pre-Work. Please read:

Book Chapters: 'Haute cuisine' in Food. The History of Taste by Paul Freedman, ed. Pages 195-202. (ced)

Book Chapters: 'Chefs, Gourmets and Gourmands. French Cuisine in the 19th and 20th Centuries' in Food. The History of Taste by Paul Freeman, ed. Pages 232-262. (ced)

SESSION 9 (LIVE IN-PERSON)

Contents: What is gastronomy? Understanding the art of food (II).

The ingredients of the day.

Lecture/Debate+

Discovery (video and/or presentation/short text): Innovators, innovations and culinary trend setters.

Pre-Work. Please read:

Book Chapters: 'Good Taste: A New Idea?' in Food. A Culinary History from Antiquity to the Present by Jean-Louis Flandrin, ed. Pages 554-559. (ced)

Book Chapters: 'Tourism and Gastronomy' in Food. A Culinary History from Antiquity to the Present by Jean-Louis Flandrin, ed. Pages 657-662. (ced)

SESSION 10 (LIVE IN-PERSON)

Field trip/ Guest speaker TBA.

SESSION 11 (LIVE IN-PERSON)

Contents: Food in art, and the art of food: Painting and writing food (I).

Food as advertising, the advertising of food (I).

The ingredients of the day.

Lecture/Debate+

Activities: analysis of works of art in small groups.

Discovery (video and/or presentation/short text): Innovators, innovations and culinary trend setters.

INDIVIDUAL PODCAST DUE

Pre-Work. Please read:

Book Chapters: 'Food is Sex' by Anthony Bourdain; (ced)

Book Chapters: 'Potatoes and Love' by Nora Ephron (ced)

Book Chapters: 'Best Quality' by Amy Tan. (ced)

SESSION 12 (LIVE IN-PERSON)

Contents: Food in art, and the art of food: Painting and writing food (II).

Food as advertising, the advertising of food (II).

The ingredients of the day.

Lecture/Debate+

Activities: Select in groups commercials on food and choose one that you think is specially powerful or funny. Explain why you like it.

Discovery (video and/or presentation/short text): Innovators, innovations and culinary trend setters.

Pre-Work. Please read:

Book Chapters: Queering the Cookbook in The Cambridge Companion to Literature and Food by J. Michelle Coghlan. Pages 131-143. (ced)

SESSION 13 (LIVE IN-PERSON)

The Politics of Food

Food and Religion

Pre-Work. Please read:

Book Chapters: 'Political Histories of Food' in The Oxford Handbook of Food History by Jeffrey M. Pilcher, ed. Pages 53-67. (ced)

Article: 'How Religions View Food' by Giovanni Filoramo. (Reset Dialogues, 1 April 2014)

Liquid gastronomy. Research and prepare at least 10 fun facts about wine and beer.

SESSION 14 (LIVE IN-PERSON)

Contents: Fast food and mass production food.

Lecture/Debate+

Activities: selection of texts (TBA) and videos to discuss as a class, and in small groups.

FINAL INDIVIDUAL ESSAY DUE

Pre-Work. Please read:

Book Chapters: 'The Macdonaldization of Culture', in Food. A Culinary History from Antiquity to the Present by Jean-Louis Flandrin, ed. Pages 684-699. (ced)

Book Chapters: 'Environment', in Fast Food. The Good, The Bad and The Hungry by Andrew F. Smith. Pages 108-125. (ced)

SESSION 15 (LIVE IN-PERSON)

FINAL TEAM PROJECTS PRESENTATIONS

LIST OF MOVIES

- *Babette's Feast*
- *Big Night*
- *Chef*
- *Chocolat*
- *Eat Drink Man Woman*
- *Fast Food Nation*
- *Haute Cuisine*
- *Jiro Dreams of Sushi*
- *Julie & Julia*
- *Like Water for Chocolate*
- *Maacher Jhol*
- *Mostly Martha*
- *Ratatouille*
- *Rotten Tomatoes*
- *Sausage Party*
- *Sideways*
- *Soul Food*
- *Super Size Me*
- *Sweet Bean*
- *Tampopo*
- *The Founder*
- *The Hundred-Foot Journey*
- *The Lunch Box*
- *The Trip*
- *The Trip To Italy*
- *Today's Special*
- *Vatel*
- *Waitress*
- *Willy Wonka and the Chocolate Factory*

BIBLIOGRAPHY

Recommended

- ALBALA, Ken. *Routledge International Handbook of Food Studies.* ISBN 9781138019492 (Digital)

  null
- BENDINER, Kenneth. *Food in Painting: From the Renaissance to the Present.* ISBN 9781861892133 (Printed)

  null
- BOURDAIN, Anthony. *Kitchen Confidential.* ISBN 9780060899226 (Printed)

 - COGHLAN, J. Michelle. *The Cambridge Companion to Literature and Food.* ISBN 9781316997796 (Printed)

 null

 - DAVIDSON, Alan. *The Penguin Companion to Food.* ISBN 9780142001639 (Printed)

 null

 - D. K. Publishing (contributor). *The Story of Food: An Illustrated History of Everything We Eat.* ISBN 9781465473363 (Printed)

 null

 - FISHER, M. F. K. *The Art of Eating.* ISBN 9780764542619 (Printed)

 null

 - FLANDRIN, Jean-Louis and Massimo MONTANARI (eds.). *Food. A Culinary History.* ISBN 9780140296587 (Printed)

 null

 - FREEDMAN, Paul (ed.). *Food. The History of Taste.* ISBN 9780520254763 (Printed)

 null

 - HARARI, Yuval Noah. *Sapiens.* ISBN 9780099590088 (Printed)

 null

 - HOLLAND, Mina. *The Edible Atlas.* ISBN 9780857868558 (Printed)

 null

 - JEKYLL, Agnes. *A Little Dinner before the Play.* ISBN 9780241950944 (Printed)

 null

 - KIPLE, Kenneth F. And Kriemhild Coneè Ornelas (eds.). *The Cambridge World History of Food (volumes one and two).* ISBN 9781139058636 (Printed)

 null

 - MALAGUZZI, Sylvia. *Food and Feasting in Art.* ISBN 9780892369140 (Printed)

 - PEPYS, Samuel. *The Joys of Excess.* ISBN 9780141966038 (Printed)

null

 - PIATTI-FARNELL, Lorna and Donna Lie BRIEN (eds.). *The Routledge Companion to Literature and Food.* ISBN 9781138048430 (Printed)

null

 - PILCHER, Jeffrey M. (ed.). *The Oxford Handbook of Food History.* ISBN 9780199729937 (Printed)

null

 - RILEY, Gillian. *Food in Art: From Prehistory to the Renaissance.* ISBN 9781780231976 (Printed)

null

 - SECKER TESDELL, Diana. *Stories from the Kitchen.* ISBN 9781101907597 (Printed)

null

 - SMITH, Andrew F.. *Fast Food. The God, the Bad and the Hungry.* ISBN 9781780235745 (Printed)

null

 - TANNAHILL, Reay. *Food in History.* ISBN 9780517884041 (Printed)

null

 - TIGNER, Amy. *Literature and Food Studies.* ISBN 9780415641203 (Printed)

null

 - TRILLIN, Calvin. *Eating with the Pilgrims and Other Pieces.* ISBN 9780241951934 (Printed)

null

EVALUATION CRITERIA

The evaluation for the course is based on class participation (both synchronous and asynchronous sessions) and individual and team work.

Short Assignment 1	10%
Short Assignment 2	10%
Participation	20%
Individual podcast	15%
Final Essay	25%
Final Team Project	20%

SUMMARY OF ASSIGNMENTS AND DEADLINES

SHORT ASSIGNMENT 1 (10 points): Choose a movie from the list provided. Write a short paper (500 words minimum, to be submitted via Turnitin on Campus), summarizing the movie first, and, then, analyzing the perspective from which it presents food as a theme: whether historical, artistic, practical, emotional, literary, etc (several can be combined). You may answer questions such as: What is the function and importance of food so the story can be narrated? Why food matters for the story? How is it represented through filmic language? More guidelines will be offered upon student's request.

DUE ON SESSION 5

SHORT ASSIGNMENT 2 (10 points): Choose a movie from the list provided. Write a short paper (500 words minimum, to be submitted via Turnitin on Campus), summarizing the movie first, and, then, exploring and discussing the relationship of the main characters with regard to food, looking at the following aspects: whether they are defined by it, how food creates a conflict for the characters or, rather, solves it, how food make the characters' story move forward. More guidelines will be offered upon student's request.

DUE ON SESSION 8

INDIVIDUAL PODCAST (15 points): Research, write and record a podcast about an iconic recipe, and trace back its history and the way it has crossed borders. Examine elements such as whether it has evolved across time, whether it has been incorporated to innovative cooking or whether it is already part of the mass food industry and why. More guidelines will be offered upon student's request.

DUE ON SESSION 11

FINAL INDIVIDUAL ESSAY (25 points).

DUE ON SESSION 14. Topics TBA

FINAL TEAM PROJECT. **Presentations in class (20 points):** The final project will explore a major culinary tradition: it could be national or regional. You may examine aspects such as its history, expansion, characteristics, influence, cultural and political impact, incorporation into *Haute Cuisine*, popular manifestations, presence in street-food, alterations and versions in food industry, among others.

DUE AND PRESENTED ON SESSION 15

Grade description and equivalents:

· Excellent/Sobresaliente: 9.0-10.0 (A- to A+)

Consistently produces work of the highest quality and craft; exhibits notable progress and development over the course of the semester; meets all course objectives at highest level; attendance is near-perfect, and contributions to course discussions are extremely valuable.

· Very Good/Notable: 7.0-8.9 (B- to B+)

Completes all assignments with work of above-average quality and craft; exhibits significant progress and development; meets most course objectives; attendance and participation are very good.

· Good/Aprobado: 6.0-7.0 (C- to C+)

Completes all assignments with work of acceptable quality and craft; exhibits some progress and development; meets a majority of course objectives. Attendance and participation are acceptable.

· Pass/Aprobado: 5.0-6.0 (D)

Assignments are delivered but are incomplete and/or of low quality and craft; exhibits little progress and development; meets few course objectives. Attendance and participation are poor, but absences do not total more than 30%.

· Fail/Suspenso: 0-4.9 (F)

Work is incomplete, missing, or does not meet course objectives. Attendance and participation are poor.

· Automatic Failure/Suspenso: 0 (F)

Please note that a student who misses 30% or more of the scheduled sessions receives an automatic 0.0, and loses his or her right to the second chance or call (convocatoria.)

Retake Policies:

Students have four opportunities to pass a course distributed in two consecutive academic years. It is mandatory to attend 100% of the classes, but if justified, students can miss up to 30% of the classes. If they miss over 30%, they will have to enroll again in the course the following year.

- Students who do not comply with the 70% attendance rule will lose their 1st and 2nd chance, and go directly to the 3rd one (they will need to enroll again in this course the next academic year).
- Students who fail the subject in the first regular period, will have to retake it in July. The dates and locations will be posted in advance by the university informing both professors and students.
- The maximum grade a student can obtain in the second exam session is 8 out of 10.

Students to submit all the work they did not turn in or failed during the course and /or retake the Midterm examination if failed.

Criteria	Percentage	Comments
SHORT ASSIGNMENT 1	10 %	
SHORT ASSIGNMENT 2	10 %	
INDIVIDUAL PODCAST	15 %	
FINAL INDIVIDUAL ESSAY	25 %	
FINAL TEAM PROJECT	20 %	
PARTICIPATION	20 %	

PROFESSOR BIO

Professor: **FLOR DE LOURDES GRAGERA DE LEON CANTERO**

E-mail: fgragera@faculty.ie.edu

Flor Gragera de León, PhD

Flor Gragera de León holds a Ph.D. in Comparative Literature from Rutgers University (New Brunswick, NJ, USA), a M.A. in Comparative Literature (UCL, University College London, UK), a MA in Journalism (El País/ Universidad Autónoma de Madrid, Spain) and a B.A. in Journalism (University of Navarra, Spain). Flor was awarded a J. William Fulbright scholarship for her doctorate studies in the US. She has coordinated courses and designed curriculum for and taught Spanish, as well as Literature and Cultural Studies, to a diverse group of students at Princeton University and Rutgers University. In addition to teaching, she has been consultant for UNESCO in its Paris headquarters, and works as a journalist, contributing to the Spanish communications group Vocento. Dr. Gragera de León has written for El País, El Mundo, and other media. She has taught at IE since 2013 both at the graduate and at the undergraduate levels.

OTHER INFORMATION
Conduct in Class:

1. Be on time: Students arriving more than 10 minutes late will be marked as "Absent". Only students that provide written notification to the professor in advance that they will be late for a specific session (and the professor confirms receipt of this information) may be granted an exemption at the discretion of the professor.

2. Respect your classmates. Classroom discussion is an important part of the learning process. Therefore, it is vital to maintain a classroom environment that is respectful and free of discrimination and/or recrimination from peers. Please keep in mind that, at times, students may disclose personal information through class discussions. It is expected that all members of the class will respect the privacy of their classmates. However, please remember that class is NOT a protected, confidential environment, and the professor cannot guarantee that other students/peers will maintain your information confidential should you choose to share it.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures (unless specifically permitted by the course professor). If a student leaves the room during lectures without receiving permission from the professor, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent".

4. Do not engage in side-conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side-conversations are not allowed.

5. The use of laptops during lectures must be authorized by the professor. The use of social media or accessing any type of content not related to the lecture is not permitted. That is, if a student uses social media during class, the student will be asked to leave the room and thus will be marked as "Absent".

6. No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

Escalation policy: Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will count as 5 absences.

7. Refrain from eating or drinking (except water) during class.

8. Assignments: I will grant each students a 24 hour grace period on ONE assignment (except the group project) during the course of the semester. Other late assignments will get a 0.

Code of Ethics/Honor

Cheating and plagiarism are very serious offenses governed by the IE student code of conduct. Any student found cheating or plagiarizing on any assignment or component of this course will at a minimum receive a "0" on the affected assignment. Moreover, the student will also be referred to the University Judicial System for further action. Additional penalties could include a note on your transcript, failing the class, or expulsion from the university.

What is academic integrity? One component of a definition is when one does the right thing even though no one is watching. The core values of integrity, both academic and otherwise include: honesty, fairness, respect, responsibility, and trust. Academic integrity requires that all students within Instituto de Empresa (IE) act in accordance with these values in the conduct of their academic work, and that they follow the rules and regulations concerning the accepted conduct, practices and procedures of academic research and writing. Academic integrity violations are defined as cheating, plagiarism or other violations of academic ethics.

Cheating includes:

a) An act or attempt to give, receive, share, or utilize unauthorized information or unauthorized assistance at any time for assignments, papers, projects, presentations, tests or examinations. Students are permitted to mentor and/or assist other students with assignments by providing insight and/or advice. However, students must not allow other students to copy their work, nor will students be permitted to copy the work of other students. Students must acknowledge when they have received assistance from others.

b) Failure to follow rules on assignments, papers, projects, presentations, tests or examinations as provided by the course professor and/or as stipulated by IE.

c) co-operation or collaboration.

d) with official documents, including electronic records.

e) The impersonation of a student on presentations, exercises, tests or an examination. This includes logging onto any electronic course management tool or program (e.g. Black Board, etc.) using someone else's login and password.

Plagiarism includes:

a) Using the work of others and attempting to present it as your own. For example, using phrases or passages from books, articles, newspapers, or the internet and not referencing them properly in your document is a form of plagiarism. This includes using information from others without citing it, misrepresentation of cited work, and misuse of quotation marks.

b) Submitting an assignment or paper that is highly similar to what someone else has written (i.e., minimal changes in wording, or where the sentences are similar, but in a different order).

c) Plagiarizing is not committing "word for word" copying. "Thought for thought" is also a form of plagiarism.

Other violations of academic ethics include:

a) Not acknowledging that the students' work or any part thereof has been submitted for credit elsewhere.

b) Misleading or false statements regarding work completed.

c) Knowingly aiding or abetting anyone in committing any form of an academic integrity violation.

Academic Misconduct Procedure for Humanities Courses

1. If a Humanities instructor suspects a student has committed academic misconduct (as defined in the student's Code of Ethics) in a Humanities course, he or she must refer the case to the Humanities program director with all the necessary supporting evidence.

2. The Humanities program director will meet with the student and write a brief summary of the instructor and the student's views and pass them on to the Bachelor's program director. The Humanities program director may also suggest what type of sanction would be appropriate for the student.

3. If there is enough objective evidence to sanction the student, the program director will check if this is the first time the student has committed academic misconduct.

4. Is this is a first breach of conduct, the program director will decide the scope of the sanction on the basis of all the above information. (Bachelor or Ethics Committee).

5. If this is a second offense or if, according to the Humanities director's report, the case is serious enough, the case will be redirected to the university's Ethics Committee.

GLOBAL MEDIA ANALYSIS: THE ROLE OF MEDIA IN INTERNATIONAL RELATIONS

IE University
Professor: **BALDER HAGERAATS**

E-mail: bhageraats@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

SUBJECT DESCRIPTION

International relations and foreign policy making are highly influenced by media and public opinion. Perceptions, discourse and analysis in newspapers, tv stations and- especially- online are intimately connected to decision makers' options and preferences in setting policy.

In this course we will analyse the mechanisms underpinning this relationship between media and policy, study underlying biases and their effects, as well as what drives journalists, commentators, and reporters on a case-by-case bias.

What has news reporting shaped the war in Ukraine? How are relations between China and the US affected? Who decides global narratives? We will use practical and recent case studies to answer these questions and explain the global media´s impact on foreign policy making in general.

OBJECTIVES AND SKILLS

The main objective of this course is to give an in-depth understanding on how public perception and global media affect international relations. This will be accomplished through:

1. Analysis of global media systems: who and what drive their overall dynamics?
2. Understanding of media interests: what are the main incentives and pressure points for journalists, news reporters and other media observers?
3. Studying current case studies; what is the media's behaviour with respect to situations of war, geopolitics and cooperation?

METHODOLOGY

This course applies general analysis of media systems and individual psychology to current case studies. Every two sessions there will be a theoretical thesis about media behaviour and its impact followed by its application to real-life situations taken from the news at the time.

There is no set literature list since readings and case study content will be decided based on recent media events. This means that before each session students will be provided with relevant reading (or video/podcast) material.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	0.0 %	0 hours
Discussions	0.0 %	0 hours
Exercises	0.0 %	0 hours
Group work	0.0 %	0 hours
Other individual studying	0.0 %	0 hours
TOTAL	0.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction: Course Overview

In this session we will look at the "big picture" of what the course is about, introduce main concepts and discuss practical course aspects.

SESSION 2 (LIVE IN-PERSON)

Case Study 1

(Content to be decided during the course as it depends on current events)

SESSION 3 (LIVE IN-PERSON)

Global Media Systems: Who, What, Where and How?

In this session we wll look at who the main global media players are (including social media platforms), how they operate and what their main impact is on international relations.

SESSION 4 (LIVE IN-PERSON)

Case Study 2

(Content to be decided during the course as it depends on current events)

SESSION 5 (LIVE IN-PERSON)

Changing Tides in the 21st Century: How is the global media landscape changing?

In this session we will look at how traditional actors are changing and new actors are rising because of technological and cultural evolution.

SESSION 6 (LIVE IN-PERSON)

Case Study 3

(Content to be decided during the course as it depends on current events)

SESSION 7 (LIVE IN-PERSON)

Geopolitics and Media: How do global powers use information and news provision to their advantage?

In this session we will look at how rivals such as China and the United States increasingly depend on media to promote their international narratives.

SESSION 8 (LIVE IN-PERSON)

Case Study 4

(Content to be decided during the course as it depends on current events)

SESSION 9 (LIVE IN-PERSON)

Psychological Factors: What drives individual content providers?

In this session we will look at issues such as bias, professional pressures and political bubbles in order to explain choices by individual journalists and news reporters.

SESSION 10 (LIVE IN-PERSON)

Case Study 5

(Content to be decided during the course as it depends on current events)

SESSION 11 (LIVE IN-PERSON)

Public Opinion: What is the relationship between global media and mass perception?

In this session we will look at how global media affect news "consumers" and vice versa.

SESSION 12 (LIVE IN-PERSON)

Case Study 6

(Content to be decided during the course as it depends on current events)

SESSION 13 (LIVE IN-PERSON)

Foreign Policy: How do the media affect foreign policy makers?

In this session we will look at how international decision makers are influenced by public news perception and social networks.

SESSION 14 (LIVE IN-PERSON)

Case Study 7

(Content to be decided during the course as it depends on current events)

SESSION 15 (LIVE IN-PERSON)

Course Summation

In this session will wrap up the course and summarise its main conclusions.

EVALUATION CRITERIA

The course grade will depend on three case studies to be submitted before sessions 5, 10 and 15. The format of these case studies will be provided in advance and will ask students to take media coverage and analyse that based on the items discussed in prior sessions.

Criteria	Percentage	Comments
Case Study 1	30 %	
Case Study 2	30 %	
Case Study 3	40 %	

PROFESSOR BIO

Professor: **BALDER HAGERAATS**

E-mail: bhageraats@faculty.ie.edu

Balder Hageraats is founding partner of ReSeT, a think tank on international relations, and a consultant to governments, multinationals and media outlets on foreign policy related issues.

OTHER INFORMATION

Throughout the course, individual (Zoom/coffee) appointments can be made by email or whatsapp:

- balder.hageraats@resetweb.org
- +34 687 54 93 75

HOW TO ACHIEVE SUCCESS

IE University
Professor: **JACOBO PARAGES REVERTERA**

E-mail: jparages@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

SUBJECT DESCRIPTION

This elective offers the students an insight on the importance of their attitude in the actions and decisions they make in their daily lives. Through these decisions and depending on their different personal tools and habilities they will have a higher possibility of achieving success in their projects and challenges, both professionally and on a personal level. This elective puts the focus on success as individuals, as professionals and as members of today´s society.

Students have many opportunities but also much more competition than in the past. Through these sessions I aim to provide complementary knowledge and information to the tools that they get throughout their career in IE University. The ultimate goal is to make students understand that "whoever wants to reach a goal, can reach it "

You, students, are at a turning point in your life. In a few months you're going to enter the labour market and this is a change of your life cycle. Through this elective you will understand how important it is in your future that you take your own decisions and project your challenges, that you really commit yourself to its achievements, that you learn how to empower yourself to make important decisions, because those will mark your path. During the past four years and throughout your time at IE University you have obtained great knowledge and very useful tools.

Through this elective you will also understand the keys behind success and the enormous importance of carrying out the knowledge that you have gained through your university career.

OBJECTIVES AND SKILLS

- What can you learn from failure
- What can you learn through success.
- How not to fail in your challenges and projects in life.
- Keys to reach success in life.
- Carry to your professional life the necessary keys to achieve your objectives.
- What are the keys to learn from our steps to success?
- How important is the attitude in achieving objectives?
- Why is it important to work in a team?

- How does fear limit us in decision making?
- Why do we have to manage emotions and embrace certain values ??that accompany us to success?
- Why do we have to have a positive look?
- What is the value of humility in success and failure?
- How can we move forward if we take risks?
- What is the value of sharing?

These are questions that we have to answer if we want aligned, healthy and productive persons and profesionals.

METHODOLOGY

Power Point

Videos: Videos are used in order to make the class more attractive.

Class discussions. It is very important to have an active participation from the students.

Open to share and listen to ideas, reflections, desires, expectations and to deepen our understanding of the day-to-day details that should drive us to achieve our personal goals.

Individual work

Group work

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15 hours
Discussions	16.0 %	12 hours
Exercises	34.67 %	26 hours
Group work	29.33 %	22 hours
Other individual studying	0.0 %	0 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction & Bases.

No matter what your decision is, it starts in your head.

The power of your mind, what goes on in your head has a huge impact on the actions that you take, the decisions that you make, the things you experience.

People miss out incredible opportunities because they make bad decisions based on a bad frame of mind.

Living an incredible life is no accident. You have to do it on purpose and it starts by knowing what you want to achieve, knowing why you want to achieve it, and knowing the kind of person you have to become in order to achieve it.

Your destiny is determined by the choices you make, choose now, choose well. (Anthony Robbins).

SESSION 2 (ASYNCHRONOUS)

Know Yourself.

"The wheel of life"

As a way of knowing yourself, establishing priorities and setting goals, I propose that you do your Wheel of Life.

It is an interesting tool that will help you to:

- Review the areas of your life.
- Identify objectives for each of the areas of your life.
- See where you are and how you see yourself in these aspects to reach those goals you want to achieve.

Through the wheel of life you will see a graphic representation of the areas of your life and it will help you to review where you are now, where you want to be, and what plans you have to make to move forward in each of them.

The areas that you can work on are those that you consider most important for yourself.

SESSION 3 (LIVE IN-PERSON)

Failure

What is really failure.

How important is it to understand that we will sooner or later not achieve an important goal.

What are the consequences of not achieving our goals?

SESSION 4 (LIVE IN-PERSON)

Success

What ir really success?

Do you have a clear idea of what success means to you?

What do successful people think about success?

SESSION 5 (LIVE IN-PERSON)

Attitude

ATTITUDE and its importance towards reaching our challenges in life (Personal & Professional).

Attitude in:

- Developing your Talent.
- Finding new opportunities.
- Finding your vocation.

90/10 Theory.

SESSION 6 (ASYNCHRONOUS)

Set and design targets

How to set and design long and shrot term Targets-Goals.

What is as target.

Golden tules for succesfull goal setting.

Set "Marts" Goals.

SESSION 7 (LIVE IN-PERSON)

Team Work & Communication

Why is team important.

Difference between team and group.

Roles in a team.

Teams vs. Individuals.

The importance of a good and usefull communication.

SESSION 8 (LIVE IN-PERSON)

Self Managemet & Leadership

Management of fear & frustration

Managing change

Importance of being pro-active

Adaptation to new situations

Leadership

SESSION 9 (LIVE IN-PERSON)

Moving out of your comfort zone - Values

What is your comfort zone.

Why stepping out of your comfort zone.

What do you learn out if your comfort zone.

Values and it´s importance in life. Values like: Compromise, confidence, passion, will, discipline, effort, sacrifice.

SESSION 10 (ASYNCHRONOUS)

Manifesto

What is a manifesto?

Why a manifesto?

You will have to create your own manifesto on: "Success"

SESSION 11 (LIVE IN-PERSON)

Case Study

Special guest will come to this session to talk about his/her success

SESSION 12 (LIVE IN-PERSON)

My personal presentation on success and failure

My personal case as an example of how to manage threats, how to deal with failure and how to reach success in challenges and targets in life.

SESSION 13 (LIVE IN-PERSON)

My personal presentation on success and failure

My personal case as an example of how to manage threats, how to deal with failure and how to reach success in challenges and targets in life.

SESSION 14 (LIVE IN-PERSON)

Students final work presentations

SESSION 15 (LIVE IN-PERSON)

Students final work presentations

EVALUATION CRITERIA

Criteria Percentage

Criteria	Percentage	Comments
Class Participation	25 %	
Individual Work	25 %	
Individual Presentation	20 %	
Group Presentation	30 %	

GENERAL OBSERVATIONS
Each student has four attempts over two consecutive academic years to pass this course. For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives,
students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade. Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year). Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

ATTENDANCE
Attendance is mandatory at IE University, as it is an essential factor of IE´s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students.

With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session.

Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other cases of force majeure, are to be consulted with the Program Management (bir.madridoffice@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility). Grading for retakes will be subject to the following rules:

The retakes will consist of a comprehensive exam or equivalent assignment. The grade will depend only on the performance on this exam;
continuous evaluation over the semester will not be taken into account.
Dates and location of the retakes will be posted in advance and will not be changed.
The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

providing faulty sources;
copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
copy-pasting material from external sources even while citing them;
using verbatim translations from sources in other languages without citing them;
copy-pasting material from external sources without citing them;
and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism.The professor will also advise the student on how to present said material. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu).

All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support.

In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **JACOBO PARAGES REVERTERA**

E-mail: jparages@faculty.ie.edu

JACOBO PARAGES REVERTERA

Degree in business management and marketing – Madrid.

Professional experience focused in marketing, communication and commercial areas.

I have developed my career in different sectors, worked in 4 multinationals managing different teams and developing very different projects, both in UK and Spain. Very much oriented into people (human being), and also brand image, brand knowledge, increasing sales and very close contact with customers and also suppliers.

Highly focused in international markets. Not only domestic market.

Since 1993 worked in different multinationals, always in marketing and communication

UNITED BISCUITS – London

TETRA PAK – Madrid

KA INTERNATIONAL – Madrid

AUCHAM – Madrid

IMPACTO – Madrid

In 2014 I create my own company: CONTROL ACTIVO DE COMUNICACION (12 employees)

In 2015 I create and develop my personal brand JPR

Since 2014 Speaker, motivator, in-company training, professor

Teacher in different business schools and universities in Madrid

I have also reached different challenges in life. Round the world trip (15 months) + other sports challenges which I have shared with different associations: fund raising for kids cancer research and for Down Syndrome.

I have written a book: "Lo que aprendí del dolor" - It is now in 8th edition

OTHER INFORMATION
CODE OF CONDUCT IN CLASS

1. Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students who notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.

2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

5. Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

6. No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

7. Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

HUMAN SECURITY

IE University
Professor: **NUNO PEREIRA DE MAGALHÃES**

E-mail: npereira@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

None.

SUBJECT DESCRIPTION

This course offers an introduction to human security, examining international security from an individual point of view rather than following a traditional state-centric perspective of national security. Students will be introduced to the main dynamics related to human security, in the context of an international system that has become increasingly globalized and institutionalized but in essence, remains anarchical due to the absence of a supranational authority empowered to guarantee not only the security of states but also the security of individuals.

OBJECTIVES AND SKILLS

To conceptualize, frame, and explain the fundamental problems of human security.

METHODOLOGY

The aim of the lectures is to offer a rigorous academic training in a friendly and relaxed environment, where students are encouraged to put themselves in the shoes of political leaders. In the first half of the class I make a presentation which goes through the essentials of the session's topic and the second half is dedicated to team presentations (all previously recorded in PPT and video format) and stimulating comments around them. The PPTs of lectures and team presentations will be uploaded only after each session, allowing you do your readings throughout the week without being influenced by the opinions of your professor and colleagues, thus promoting your intellectual independence and critical thinking.

There are two types of academic readings used in the course. Firstly, there are compulsory readings for each class, around 50 pages. You need to read these in order to fully profit from my presentation and to be able to participate in class in an informed manner. Secondly, if you have time, there are the so called supplementary readings that allow you to deepen your knowledge about each topic. Suplementary readings are used in team presentations.

Besides the academic readings provided in this course, students are advised to read newspapers with a solid coverage of international politics, a rigorous weekly magazine (e.g. The Economist), and a journal focused on foreign policy issues (e.g. Foreign Affairs).

The grade of students will result from four evaluation elements:

A) Class participation

B) Team presentation

C) Midterm exam

D) Final paper

I will always be happy to provide academic support to students and to help them in their professional applications, so if there is something I can do for you feel free to schedule an appointment.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	40.0 %	30 hours
Discussions	26.67 %	20 hours
Exercises	66.67 %	50 hours
Group work	40.0 %	30 hours
Other individual studying	26.67 %	20 hours
TOTAL	200.01 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction:

Examining the concept of Human Security and how it is framed according to diverse International Relations theories.

Book Chapters: Amitav Acharya, "Human Security", in John Baylis, Steve Smith, and Patricia Owens, eds., The Globalization of World Politics: An Introduction to International Relations, Oxford University Press, 5th ed. 2011. (IE Library)

SESSION 2 (LIVE IN-PERSON)

International regimes: An overview

Basic readings:

Book Chapters: J. Samuel Barkin, " From International to Human Security " , in International Organization: Theories and Institutions, Palgrave, 2013, C

Article: Human Security: Paradigm Shift or Hot Air? (International Security, 26, issue 2, 2001, pp. 87-102) (ced)

Article: Explaining the Advocacy Agenda: Insights from the Human Security Network (GROUP A) (International Organization, Volume 68, Issue 2 April 2014, pp. 449-470) (ced)

Advanced readings:

Charli Carpenter et al. , " Explaining the Advocacy Agenda: Insights from the Human Security Network "International Organization, Volume 68, Issue 2April 2014, pp. 449-470 (**GROUP A**)

SESSION 3 (LIVE IN-PERSON)

Human rights and international intervention

Readings (all mandatory):

Book Chapters: Joshua Goldstein and Jon Pevehouse, "International Organization, Law, and Human Rights", International Relations, 10th edition, Longman, 2012, Chapter 7. (IE Library)

Article: The Responsibility to Protect—Five Years On (GROUP B) (Ethics & International Affairs, 2010) (ced)

SESSION 4 (LIVE IN-PERSON)

Genocide

Basic readings:

Book Chapters: Genocide: A Comprehensive Introduction, Chapter 1 (IE Library)

Article: The Rwandan Genocide: Why Early Warning Failed (GROUP C) (Journal of African Conflicts and Peace Studies, Vol. 1, 2, 2009, pp. 6-25) (ced)

Advanced readings:

Gregory H. Stanton, « The Rwandan Genocide: Why Early Warning Failed » , Journal of African Conflicts and Peace Studies, Vol. 1, 2, 2009, pp. 6-25 **(GROUP C)**

SESSION 5 (LIVE IN-PERSON)

War, soldiers, and civilians

Basic readings:

Book Chapters: Gary D. Solis, The Law of Armed Conflict: International Humanitarian Law in War, Cambridge University Press, 2010, Chapter 1. (Book Not Available on IE Library)

Article: Killing Civilians: Thinking the Practice of War (British Journal of Politics and International Studies , 14, 2012 , pp. 423-440) (ced)

Article: Protecting civilians in civil war: The institution of the ATCC in Colombia (GROUP E) (Journal of Peace Research, 50(3) , 2013, 351–367) (ced)

Technical note: Alexandre J. Vautravers, " Why Child Soldiers are Such a Complex Issue " (GROUP D) (Refugee Survey Quarterly 27 (4), 2008, pp. 96-107) (ced)

Advanced readings:

Maja Zehfuss, " Killing Civilians: Thinking the Practice of War " , British Journal of Politics and International Studies , 14, 2012 , pp. 423-440.

Alexandre J. Vautravers, " Why Child Soldiers are Such a Complex Issue " , Refugee Survey Quarterly 27 (4), 2008, pp. 96-107 **(GROUP D)**

Oliver Kaplan, " Protecting civilians in civil war: The institution of the ATCC in Colombia " , Journal of Peace Research, 50(3) , 2013, 351–367 **(GROUP E)**

SESSION 6 (LIVE IN-PERSON)

War and gender

Basic readings:

Article: Seeing sex, gender, and sexuality in international security (International Journal, 70 (3), 2015) (ced)

Article: Ordered Rape: A Principal–Agent Analysis of Wartime Sexual Violence in the DR Congo (GROUP F) (Violence Against Women, Vol. 21(11), 2015, pp. 1341–1363) (ced)

Advanced readings:
Gerald Schneider, Lilli Banholzer, and Laura Albarracin, " Ordered Rape: A Principal–Agent Analysis of Wartime Sexual Violence in the DR Congo " , Violence Against Women, Vol. 21(11), 2015, pp. 1341–136**3 (GROUP F)**

SESSION 7 (LIVE IN-PERSON)

Terrorism

Basic readings:

Book Chapters: James Kiras,: Terrorism and Globalization (chapter 23), in The Globalization of World Politics: An Introduction to International Relations (ced)

Article: Toward a Theory of Terrorism: Human Security as a Determinant of Terrorism (Studies in Conflict & Terrorism, Vol. 29, 7, 2006, pp. 679-702) (ced)

Article: Selection, Availability, and Opportunity: The Conditional Effect of Poverty on Terrorist Group Participation (GROUP G) (Journal of Conflict Resolution , vol. 55 no. 1 , 2011, pp. 106-132) (ced)

Advanced readings:

Jennifer Kavanagh, « Selection, Availability, and Opportunity: The Conditional Effect of Poverty on Terrorist Group Participation » , Journal of Conflict Resolution , vol. 55 no. 1 , 2011, pp. 106-132 **(GROUP G)**

SESSION 8 (LIVE IN-PERSON)

Midterm Exam

SESSION 9 (LIVE IN-PERSON)

Modern slavery

Basic readings:

Book Chapters: Silvia Scarpa, Trafficking in Human Beings: Modern Slavery, Oxford University Press, Chapter 1 (Book not available on IE Library)

Article: Modern slavery challenges to supply chain management (GROUP H) (Supply Chain Management: An International Journal, Vol. 20, 5, pp.485 - 494) (ced)

Advanced readings:

Stefan Gold , Alexander Trautrims , Zoe Trodd , (2015) « Modern slavery challenges to supply chain management» , Supply Chain Management: An International Journal, Vol. 20, 5, pp.485 - 494 **(GROUP H)**

SESSION 10 (LIVE IN-PERSON)

The plight of refugees

Readings:

Book Chapters: Philip Marfleet, Refugees in a Global Era , Palgrave Macmillan, 2006, Introduction and Chapter 1. (Book not Available on IE Library)

No group presentation: Teams debate (Case study: the European Union, Africa, and the Middle East)

SESSION 11 (LIVE IN-PERSON)

Narcotraffic

Basic readings:

Article: Drugs and development: The global impact of drug use and trafficking on social and economic development (International Journal of Drug Policy, 19 , 2008, pp. 467–478) (ced)
Article: Citizenship or Repression? Coca, Eradication and Development in the Andes (GROUP I) (Stability: International Journal of Security & Development, 5(1): 3, 2016, pp. 1–19) (ced)

Advanced readings:

Grisaffi, T and Ledebur, K « Citizenship or Repression? Coca, Eradication and Development in the Andes », Stability: International Journal of Security & Development, 5(1): 3, 2016, pp. 1–19 **(GROUP I)**

SESSION 12 (LIVE IN-PERSON)

Poverty

Basic readings:

Book Chapters: Caroline Thomas and Tony Evans, « Poverty, Development and Hunger, » , chapter 28 in BSO, pp. 458-477. (ced)
Book Chapters: Fredrick Mutesa and Wilma Nchito, « Human Security and Poverty Reduction in Zambia » , in The Many faces of Human Security: Case Studies of Seven Countries in Southern Africa, , 2005. (GROUP J) (ced)

Advanced readings:

Fredrick Mutesa and Wilma Nchito, « Human Security and Poverty Reduction in Zambia » , in The Many faces of Human Security: Case Studies of Seven Countries in Southern Africa, eds. Keith Muloongo, Roger. Kibasomba, and Jemima Kariri , 2005**. (GROUP J)**

SESSION 13 (LIVE IN-PERSON)

Bio-environmental hazards

Basic readings:

Article: The Neglected Dimension of Global Security — A Framework for Countering Infectious-Disease Crises (New England Journal of Medicine, 374, 2016, pp. 1281-1287) (ced)
Book Chapters: Global Environmental Change and Human Security; Chapter 1 - Global Environmental Change and Human Security: An Introduction (IE Library)
Article: The Oxford Handbook of the International Relations of Asia, Chapter 33 - Environment, Human Security, and Cooperation in Asia - pp. 641-663. (GROUP K) (Book Not Available on IE Library)

Advanced readings:

Kim D. Reimann, « Environment, Human Security, and Cooperation in Asia » , in Saadia Pekkanen, John Ravenhill, and Rosemary Foot eds. The Oxford Handbook of the International Relations of Asia, Oxford University Press, 2014, Chapter 33, pp. 641-663**. (GROUP K)**

SESSION 14 (LIVE IN-PERSON)

Technological hazards:

Cybersecurity

Artificial Intelligence

Genetic modification

(Readings tbd)

No group presentation: guest lecturer

SESSION 15 (LIVE IN-PERSON)

Conclusion:

- Submission of the final essay

- Review of the course

- Last remarks: the future of human security

EVALUATION CRITERIA

Your final grade in the course will be based on the following weighed criteria:

A) Class participation (10 percent)

B) Team presentation (20 percent)

C) Intermediate test [midterm exam] (30 percent)

D) Final exam [final paper] (40 percent)

Criteria	Percentage	Comments
Class Participation	10 %	
Group Presentation	20 %	
Intermediate Tests	30 %	
Final Exam	40 %	

GUIDELINES

A) Class participation

Students are encouraged to freely, respectfully, and, I hope, enthusiastically express their opinions in class. Do not worry if you are a bit shy, which is only natural and tends to disappear when people feel comfortable in a friendly environment, like certainly our class will be. All participation is valued but a top grade is only attributed to students that express their opinion in a logically consistent manner, supported by evidence, and showing that the mandatory readings were done. Your interpersonal skills and ability to debate in public will definitely benefit from your participation in class. The tasks required in the two asynchronous sessions will be evaluated as part of participation.

B) Team presentation

This task is about critically assessing the argument of a scholarly article. In 30 minutes students are expected to make a summary of the article and give their opinion about it on the basis of logic and empirical evidence present in secondary sources such as statistical databases or official documentation. If students disagree with the argument they should identify the inconsistencies at logical, empirical, or both levels. On the contrary, if they agree, they should highlight its logical consistency against alternative arguments and try to provide more empirical evidence than the author did. It is mostly a test of analysis and public speaking but it is also designed to improve your skills as a team player. Regardless of the type of class, all presentations are previously recorded in PPT and video format.

C) Midterm exam

In the midterm exam students will be evaluated on their knowledge about the topics covered from sessions 1 to 7. The mandatory readings offer sufficient material to correctly answer the questions but going through the complementary readings increase your chances of getting top marks. The exam consists of six questions, from which you select five. These are not straightforward questions about concepts or dates but rather questions that challenge you intellectually and make you think critically about an issue. Answers should be clear and robust, within the limits of time, offering a logical argument supported by a couple of empirical examples. The exam will take 1 hour and 30 minutes, since students are expected to dedicate 15 minutes to plan, write, and review each question, plus 15 minutes to review the exam. This will test and hopefully improve your ability to think and write under pressure.

D) Final paper

Goal: To write a scholarly essay that addresses one topic referring to one of the sessions from 9 to 15. The essay should compare distinct arguments in the literature and support the argument that the students considers to be the valid one (more logical, better supported by empirical evidence, or both). This essay is bound to improve students' ability to critically examine arguments, to support a given one, and to derive policy advices from it.

Size: 3,000 words, not including tables and bibliography.

Reference system: Harvard (http://www.citethisforme.com/harvard-referencing).

Format: Times New Roman size 12; 1.5 paragraph space; include student name, number, and course name on the right hand corner of the first page.

Plagiarism: Plagiarism is obviously prohibited and subject to IEU disciplinary rules. Essays are submitted through Turnitin and plagiarism is assessed according to its criteria (see https://www.turnitin.com/solutions/plagiarism-prevention).

Submission deadline: TBD

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade. Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today´s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goal (1) No Poverty, (2) Zero Hunger, (4) Quality Education, (5) Gender Equality, (7) Affordable and Clean Energy, (8) Decent Work and Economic Growth, (10) Reducing Inequality, Climate Action, (16) Peace, Justice, and Strong Institutions. Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

In-person attendance is mandatory at IE University, as it is an essential factor of IE´s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session.

Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other cases of force majeure, are to be consulted with the Program Management (bir.biemadrid@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

For more information about the university attendance policy, please check; https://www.ie.edu/student-guide/bir/policies-and-guidelines/attendance/

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

· The retakes will consist of a comprehensive exam or equivalent assignment. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.

· Dates and location of the retakes will be posted in advance and will not be changed.

· The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

· providing faulty sources;

· copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;

· copy-pasting material from external sources even while citing them;

· using verbatim translations from sources in other languages without citing them;

· copy-pasting material from external sources without citing them;

· and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **NUNO PEREIRA DE MAGALHÃES**

E-mail: npereira@faculty.ie.edu

NUNO PEREIRA DE MAGALHÃES

I am an adjunct professor of International Relations at IE University; a researcher for the Portuguese Institute of International Relations, Nova University of Lisbon; co-founder and Principal Observer at OPEN - National Foreign Policy Observatory; and an associate of the Institute of National Defence of Portugal's Ministry of Defence. I specialize in International Relations theory and in international security (international organizations of defense, nuclear proliferation, and conflict management).

Previously, I was a professor of International Relations at HUFS and an ARI Fellow at Korea University; a Japan Foundation Fellow at the University of Tokyo; a Taiwan Fellow at National Taiwan University; a consultant for the Portuguese Mission to the United Nations during the presidency of the UNSC Committee 1718 on North Korean nuclear sanctions; a research associate at Harvard University's Weatherhead Center for International Affairs; a teaching instructor for the MSt in International Relations at the University of Cambridge; a visiting researcher at the Department of Political Science of Seoul National University; a visiting scholar at Columbia University's School of International and Public Affairs and Department of Political Science; a visiting fellow at Harvard's Graduate School of Arts and Sciences and Kennedy School of Government; an FCT scholar at the University of Cambridge; a KGSP scholar at Sogang University; and an affiliate at the General Direction of EU Affairs of the Ministry of Foreign Affairs in Portugal.

I hold an MPhil in International Relations and a PhD in Politics and International Studies, both from the University of Cambridge.

OTHER INFORMATION

Office hours: By appointment. Please send me an email and I will be happy to schedule a meeting in person or through Zoom.

CODE OF CONDUCT IN CLASS

1. Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.

2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

5. Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

6. No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

7. Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

INTERNATIONALIZING BUSINESS

IE University
Professor: **PABLO NEIRA DE ALVEAR**

E-mail: pneira@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

SUBJECT DESCRIPTION

The course objective is to learn the fundamentals of the strategic analysis approach required for organizations in the process of internationalizing and the different entry options into foreign markets; together with understanding the various financing alternatives to support those entry strategies.

The course covers the different means of international payment and the trade finance instruments used to operate in global markets. Finally, the course describes the international trade risks associated with those instruments together with the tools to cover and mitigate them.

OBJECTIVES AND SKILLS

Participants will learn and have comprehensive and practical approach to:

- Think strategically in a globalized world and asses how to develop business beyond their borders.

- Understand the basis to perform industry and company strategic analysis in a globalized world and what international advantage can a company exploit to win across borders and markets.

- Learn how to reach new markets and the different entry alternatives; evaluating which strategic activities to own and which to execute through alliances or outsourcing.

- Understand funding alternatives available for businesses in the process of internationalizing.

- The fundamental means of international payment and collection; as well as financing instruments for international trade.

- Key knowledge of international trade risks as well as instruments of coverage and mitigation of main political and financial risks.

METHODOLOGY

The course combines professor presentations, class discussion and the case method. Teaching sessions will require the participation of the students via either structured discussion or exercises based on the professor´s presentation. Therefore, students are expected to be active participants in the course.

As sessions will come along with case-studies related to the subjects discussed, it is essential that they come to class prepared to discuss the topics of the case and, when assigned, the readings on business management and current articles associated to the session.

In addition to everyday class discussions, there will be a project related to the internationalization of a company that the students will need to carry out in groups, throughout the course, and that will be presented in groups on sessions 14 and 15.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	22.67 %	17 hours
Discussions	6.67 %	5 hours
Exercises	1.33 %	1 hours
Group work	20.0 %	15 hours
Other individual studying	49.33 %	37 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

A global world: trends and implications for business enterprise and management.

Technical note: Distance Still Matters: (**Read only pages 1 to 3**)

Article: 14 disruptive trends you need to know about in 2022 (CED)

Article: Distance Still Matters: The Hard Reality of Global Expansion (HBS R0108K-PDF-ENGy)

Technical note: 14 disruptive trends you need to know about in 2022 (s-c)

SESSION 3 (LIVE IN-PERSON)

Benefit and reasons to internationalize.

Technical note: Making SMEs International (IESE, CED)

Article: Making SMEs International (Alumni Magazine IESE, JANUARY-MARCH 2014 / No. 132) (ced)

SESSION 4 (LIVE IN-PERSON)

Ready to Internationalieze?

T.N.: VRIO Framework. Strategic Management Insight. October 21, 2013

T.N.: Resource Based View. Strategic Management insight. October 14, 2013.

Technical note: The Five Competitive Forces That Shape Strategy

Technical note: Resource Based View and VRIO framework (s-c)

Technical note: Porter´s FIVE forces and Stretegies (s-c)

SESSION 5 (LIVE IN-PERSON)

International strategy: where to expand your business.

Article: Distance Still Matters: The Hard Reality of Global Expansion (HBS R0108K-PDF- ENG)

SESSION 6 (ASYNCHRONOUS)

Case study: What business is Zara in?

Practical Case: What business is Zara in? () (HBS W19157-PDF-ENG)

SESSIONS 7 - 8 (LIVE IN-PERSON)

Internationalization alternatives: entry strategies.

Article: When to alley, when to acquire (HBS R0407H-PDF-ENG)

SESSION 9 (LIVE IN-PERSON)

VERTICAL INTEGRATION

Book Chapters: Contemporary Strategy Analysis, chapter 11 (See Bibliography)

SESSION 10 (LIVE IN-PERSON)

DIVERSIFICATION

Book Chapters: Contemporary Strategy Analysis, chapter 13 (See Bibliography)

SESSION 11 (LIVE IN-PERSON)

Funding international business.

Materials: To be posted on the campus

SESSION 12 (LIVE IN-PERSON)

International trade means of payments.

Technical note: Note on International Trade Finance (HBS 211007-PDF-ENG)

SESSION 13 (LIVE IN-PERSON)

International trade risks.

Materials to be posted on campus.

SESSIONS 14 - 15 (LIVE IN-PERSON)

FINAL PROJECT presentations.

BIBLIOGRAPHY

Compulsory

- Robert Grant. (2021). *Contemporary Strategy Analysis.* 11th edition. Wiley-Blackwell. ISBN 9781119815235 (Printed)

EVALUATION CRITERIA

The course will be evaluated under four criterias:

1. Class Participation

As the course combines professor presentations, **class discussion** and uses the case method on one session, students are expected to be fully prepared to discuss the topics raised in the case and accompanying readings for a particular sessions. The better the class discussion – i.e. the more high quality contributions from a diverse a range of students and perspectives as possible – the richer will be the learning experience for everybody. It is highly recommended to read the T.N. beforehand.

2. Individual work.

Assignements related to specific technichal notes in connection with the sessions. .

3. Group works.

 A case analysis on Zara and reports about relevant articles that complement key issues of the sessions.

4. Final Project.

The final project consists on a **complete internationalization strategy for a company**. The company to internationalize will be chosen by each student and the project will be presented on the last sessions of the course.

Criteria	Percentage	Comments
Class Participation	10 %	
Individual Work	20 %	Assignments related to technichal notes.
Workgroups	20 %	Written documents//case and presentations
FINAL PROJECT	50 %	Internationalization Plan for a company

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade. Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today´s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goal X, Y and Z (Define goals here). Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

In-person attendance is mandatory at IE University, as it is an essential factor of IE´s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session.

Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other cases of force majeure, are to be consulted with the Program Management (bir.biemadrid@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

For more information about the university attendance policy, please check; https://www.ie.edu/student-guide/bir/policies-and-guidelines/attendance/

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

·   The retakes will consist of a comprehensive exam or equivalent assignment. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.

·   Dates and location of the retakes will be posted in advance and will not be changed.

·   The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

·   providing faulty sources;

·   copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;

·   copy-pasting material from external sources even while citing them;

·   using verbatim translations from sources in other languages without citing them;

·   copy-pasting material from external sources without citing them;

·   and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **PABLO NEIRA DE ALVEAR**

E-mail: pneira@faculty.ie.edu

PABLO NEIRA DE ALVEAR

Harvard Business School MBA, 1993

Graduated in **Economics, CEU & UCM**, Madrid, 1986

Professional background

Pablo has 34+ years of international executive experience specializing in managing listed, private equity backed, and family businesses. Broad-based experience across international and cultural boundaries as CEO, Board Member, Finance Director and management consultant.

Hands-on experience in market strategy and global business development, combining international expansion (organic and M&A), with broadening product and customer scope. Managed internationalization of businesses in Europe, LATAM and USA settling subsidiaries, joint-ventures, distributors and M&A operations.

Academic experience

Professor Neira has been teaching at the IE of Public Affairs since 2018 International Trade, Managing Multinational Corporations, Internationalization of Business and at several Masters degrees, including the IMBA and the MIM.

OTHER INFORMATION

Office hours available by appointment, sending an email to **pneira@faculty.ie.edu**

CODE OF CONDUCT IN CLASS

1.   Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.

2.   If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3.   Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4.   Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

5.   Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

6.   No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

7.   Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences**.**

SDG GOALS

The course SDG main goals are *Quality Education* to increase the number of people with relevant skills for financial success, educating for global citizenship; *Decent Work and Economic Growth* to innovate for economic productivity trying to improve resource efficiency in consumption and production and finally *Industry, Innovation and Infrastructure* to enhance research and upgrade industrial technologies.

INTERPLANETARY RELATIONS

IE University
Professor: **ANDREW BERTOLI**

E-mail: abertoli@faculty.ie.edu

Professor: **CHARLES KUSHNER**

E-mail: ckushner@faculty.ie.edu

Professor: **IBRAHIM AL-MARASHI**

E-mail: ial-marashi@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

SUBJECT DESCRIPTION

The Elevator Pitch: Dungeons and Dragons for IR on Mars.
(It's like the IE version of The Expanse... the ieXPANSE)

Season 1 of **Interplanetary Relations** saw students plan and launch the first missions to colonize Mars using both public and governmental entities. The last generation has left you maps, mineral resources, and a population of 100,000 total humans living on Mars. They also left you new alliances that don't exist on Earth and shockingly little on decisive actions about International policy on Mars. No regulatory bodies were created on Mars, so for now all decisions made for Mars are being made millions of miles away.

Season 2 of **Interplanetary Relations** picks up right were the previous season ended. However the situations on Earth and Mars are becoming dramatically different. Students will self assign after session 6 to either Team Earth or Team Mars. Within each team, students will further self-assign to terrestrial entities, either private or state. For example, you could chose to represent Earth/USA or Mars/NASA. You could choose to be from Mars/SpaceX or Earth/SpaceX. Half the class will represent interests on Earth and the other half will represent interests on Mars, yet at the same time every student will have vested interests in both terrestial bodies.

This is a thematic course, it includes elements of media, games, simulations and other extracurricular means by which to encourage and improve your learning outcomes. It depends heavily on in-person participation!

OBJECTIVES AND SKILLS

The objective of this elective is to cultivate and test the mettle of your core competencies in vital areas of International Relations such as; International Relations Theory, International Law, and Peace and Conflict Resolution.

METHODOLOGY

All course days planned as double sessions. The beggining of this course is devoted to lecture sessions to bring students up to speed on various topics such as History, Science and Science Fiction, Space Militarization. After the drop period ends we will begin the gameplay portions. Gameplay will usually follow a structure of Lecture session followed by Gameplay session. Some changes to this syllabus could be realized during the semester if for example we want to bring in an important guest to speak to the class, however those changes would only come after the mid-term quiz. Participation will matter not just in class, but also in the online discussion boards, maps, etc used throughout the course.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	26.67 %	20 hours
Discussions	26.67 %	20 hours
Exercises	13.33 %	10 hours
Group work	6.67 %	5 hours
Other individual studying	26.67 %	20 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Welcome to Interplanetary Relations

Mars in the public imagination

Identity in the age of interplanetarianism

Try to review one of the recommended materials below before the first session

Book Chapters: Total Recall (Recommended) (IE Library)

Video: Total Recall (1990) (Highly Recommended)

Video: MARS (National Geographic, avail. Disney+) (Highly Recommended)

Video: The Martian (2015) (Highly Recommended)

Podcast: The War of the Worlds (original 1938 radio braodcast) (Youtube)

Book Chapters: The History of Science Fiction, chapter 1 (ced)

Article: A History of Social Science Fiction (Science Fiction Studies , Jul., 2003, Vol. 30, No. 2,

Social Science Fiction (Jul., 2003), pp. 161-173) (ced)

Sessions led by Ibrahim Al-Marashi

SESSIONS 3 - 4 (LIVE IN-PERSON)

The Complete History of the Space Race

Session led by Ibrahim Al-Marashi covers the space race from the beggining to the current day.

Book Chapters: John R. Moss,: "Mars for the Martians" in "The Theory of Self Determination".

Required. (ced)
Book Chapters: Carl Sagan: Pale Blue Dot: Chapter 1 Required (ced)
Book Chapters: Carl Sagan: Pale Blue Dot A Vision of the Human Future in Space - Chapter 22 (ced)
Article: Why Mars should be independent from Earth. Recommended. (BBC, 16th December 2015)
Video: The Right Stuff (either the 1980's movie or the 2021 Apple+ series) Recommended
Working Paper: US Military Lunar Base Program, 1960 (Required) (National Security Archive)
 Sessions will be led by Ibrahim Al-Marashi

SESSIONS 5 - 6 (LIVE IN-PERSON)
 The Militarization of Space
 Session 5 led by Andrew Bertoli
Book Chapters: Paul Williams and Matt McDonald: Security Studies, chapters 1-3 and 38 (ced)
Book Chapters: Paul D. Williams and Matt McDonald: Security Studies, chapters 1-3 and 38 (ced)
Article: MILITARY USES OF OUTER SPACE: LEGAL LIMITATIONS, CONTEMPORARY PERSPECTIVES (JOURNAL OF SPACE LAW: VOL. 39: NO. 2) (ced)
 Session 6 led by Ibrahim Al-Marashi

SESSIONS 7 - 8 (LIVE IN-PERSON)
 SATELLITES AND CYBER WARFARE LECTURE
 Session 7 led by Andrew Bertoli
Games & Simulations: Facing New Challenges in Space & Cyber Affairs: SpaceGov (IRE090056-U-ENG-HTM)
 SATELLITES AND CYBER WARFARE GAME
 Session 8 led by Andrew Bertoli

SESSIONS 9 - 10 (LIVE IN-PERSON)
 MID-TERM QUIZ
Session 9 led by Charles Kushner
The mid-term will be a timed multiple choice exam, it will cover topics from the previous lecture sessions. Following the exam we will divide into our teams and particpate in an escape room style game.
 Martian Escape Room
 Session 10 led by Charles Kushner

SESSIONS 11 - 12 (LIVE IN-PERSON)
 International Law in Space
 Session 11 led by Andrew Bertoli
 The Martian Land Grab
 A roll based game to compete for territory and resources on Mars.
 Session 12 led by Charles Kushner

SESSIONS 13 - 14 (LIVE IN-PERSON)

Negotiation tactics for the final frontier

Session 13 led by Andrew Bertoli

Negotiation Game

The roll based land grab game was sure to cause some bad blood between entities on Earth, Mars or both. Let's smooth things out by playing a friendly game of Cosmopoly, try to use the lessons learned in the lecture to dominate the other team!

Session 14 led by Charles Kushner

SESSIONS 15 - 16 (LIVE IN-PERSON)

TRUST LECTURE

Session 15 led by Andrew Bertoli

Article: The Inscrutable Intentions of Great Powers (International Security 39(3):48–88) (ced)

Article: Correspondence: Can Great Powers Discern Intentions? (International Security 40(3):197–215) (ced)

TRUST GAME

It might be hard to trust eachother after the negotiations, conversley you may all be feeling the love at this moment. Don't mind us we're just here to throw a wrench in the problem! This game will teach you how hard it is to trust, but also how very important it is. There will be no trust falls, we swear!

Session 16 led by Charles Kushner

SESSIONS 17 - 18 (LIVE IN-PERSON)

The Solar System Summit

Sessions led by Charles Kushner

Let's wrap this up in a nice neat package. Taking what we've learned from lectures and games over the duration of the course, we will be hosting the very first Solar System Summit. This will be a comprehensive summit to put down on paper how the various human settlements throughout the solar system wish govern themselves. It will cover the soverignty of celestial bodies, the interplanetary laws that should be adopted henceforth, and possibly the creation of a celestial regulatory body similar to Earth's United Nations. Really the goals of the summit, the success of its outcomes will depend entirely on you. You will be leaving these words, laws and actions for a future generation of IE University Interplanetary Relations students.

SESSIONS 19 - 20 (LIVE IN-PERSON)

Interplanetary Film Festival

We will be screening the 1990 classic film Total Recall starring Arnold Schwarzenegger.

Following the film we will host a discussion about the film, the themes within, differences between the feature and the novel written in the 1960's and how these themes relate to our own fictionalized Mars.

The final essay will be due here.

Sessions led by Charles Kushner

BIBLIOGRAPHY

Recommended

 - Nadine Barlow. (2014). *Mars: An Introduction to its Interior, Surface and Atmosphere.* 1st. Cambrige University Press. ISBN 1107644879 (Digital)

EVALUATION CRITERIA

Participation in class discussions and games will be worth 10% of the grade. Adding posts in various discussion boards used throughout the course will be evaluated for 25% of the final grade. The mid-term quiz compromises another 25% of the final grade. The remaining 40% of the final grade will be earned based on the results of a 2000 word limit essay. The final essay may be about any subject relevant to the themes of the course, international relations and space. As a general rubric the highest marks will be awarded to essays which display original thought and proper use of academic research and ethics.

Criteria	Percentage	Comments
Class Participation	10 %	
Discussion Boards	25 %	
Mid-Term Quiz	25 %	
Final Essay	40 %	

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ATTENDANCE

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· copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;

· copy-pasting material from external sources even while citing them;

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PROFESSOR BIO

Professor: **ANDREW BERTOLI**

E-mail: abertoli@faculty.ie.edu

ANDREW BERTOLI

Andrew Bertoli is an assistant professor at IE University. His research explores such topics as how sports influence world politics, which types of leaders are the greatest threats to international stability, and the role that the internet has played in intensifying ideological conflicts. Prior to coming to IE, Andrew received a Ph.D. in political science and an M.A. in statistics from UC Berkeley, where he also taught courses on international security and research methods.

Professor: **CHARLES KUSHNER**

E-mail: ckushner@faculty.ie.edu

CHARLES KUSHNER

Charlie Kushner has a Bachelor's in Photography from Columbia College Chicago (2004), and a Master's in Corporate and Marketing Communications from IE Business School (2020). He had previously worked in Japan, Chicago and Spain for both governmental and private sectors. Mostly he has had a career in the production and publishing sector as a graphic designer from 2004 until 2015. In 2015 he had a sudden desire to change career paths. He has since then worked for IE University in the undergraduate programs of the School of Global and Public Affairs as a faculty manager and as an adjunct faculty member. His previously taught courses include Digital Skills For Success and Interplanetary Relations.

This professor is also a self described, geek / nerd and has a deep appreciation for all things sci-fi. He's an artist and a dreamer, a thinker and a wanderer. He likes to imagine the impossibly big and ponder the preposterously small. He just hopes his kids won't move to Mars.

Professor: **IBRAHIM AL-MARASHI**

E-mail: ial-marashi@faculty.ie.edu

IBRAHIM AL-MARASHI

Your professor is a geek/nerd who will litter his explanations of IR with references to Star Wars, Game of Thrones, and South Park. I would recommend watching these…at home, not in class.

Al-Marashi is an Associate Professor of history at California State University San Marcos. He is both a US and UK national, and obtained his doctorate from the University of Oxford. He has taught courses on conflict resolution at Sabanci University in Istanbul, Turkey, and the United Nations University of Peace in San Jose, Costa Rica. He regularly serves as a visiting professor at John Cabot University in Rome, Italy, Cattolica University in Milan, Italy, and for a summer school at Charles University in Prague, Czech Republic, and Ivan Franko University, in Lviv, Ukraine, and the Middlebury Institute of International Studies, in Monterey, California. He is also a practitioner of IR, having worked with the United Nations Education, Scientific and Cultural Organization (UNESCO), United Nations Development Program (UNDP), and other NGOs on project in Iraq.

OTHER INFORMATION

Office hours available upon request, drop-ins accepted. Charles Kushner may be found in his office on the 18th floor (T-18.16) almost every day of the week.

CODE OF CONDUCT IN CLASS

1.   Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.

2.   If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3.   Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4.   Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

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NATIONALISM, POPULISM AND RETRO-UTOPIANISM

IE University
Professor: **OSCAR MARTINEZ TAPIA**

E-mail: omartinez@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
NONE

SUBJECT DESCRIPTION
UNPLUGGED III: NATIONALISM, POPULISM & RETRO-UTOPIANISM

Western democracies and developing societies alike are living through interestign political transformations. It can probably be traced back to the late 20th century, but it has been especially since the election of Donald Trump and the Brexit in 2016 that political polarization and a new resurgence of nationalism, populism and other cross-cutting movements have arrived to our societies. Both on the left and the right of the political spectrum, these movements, oftentimes transformed in political parties, have challenged the supremacy of established parties and have entered the political competition with uneven electoral success. This course tries to offer some understanding to the confusion created by many different labels that puzzle political analysts everywhere. Concepts like "Alt-Right", "National-Populism", "Homo-nationalism", "Anti-feminism", "Paleo-reactionaries", "New-libertarianism" and "Retro-Utopianism", among many others, challenge the way in which we interact with the political system and, more importantly, seem to threaten elites in democracies that perhaps were too accommodated and comfortable in their power positions. Party systems have been changed/transformed and issues that were often kept out of the political debate due to certain "political correctness" have now invaded political discussion almost everywhere. Many explanations compete to fully understand the success of these movements including hyper-globalization, economic crisis, COVID pandemic, demographic and environmental apocalypses of all sorts, etc. But the interconnectness as well as the multidimensional character of these ideas keep challenging our proper understanding. This course aims to throw some light onto such mysterious and complex phenomena.

OBJECTIVES AND SKILLS
- Understand the relevance of current, state-of-the-art scientific and political knowledge on the study of socio-political issues.

- Apply the basic concepts developed by readings to a complex changing reality.
- Gain the conceptual tools to study how the socio-political trends affect the policy process and, more generally, the life of everyone.
- Apply the analytical skills acquired regarding the former three points to study the following key (and interconnected) policy areas: party politics, electoral processes and political campaigning.

METHODOLOGY

The course will be relying on active participation in class by students, engagement in discussion, contributing with ideas that "put dots together" and good attitude. In addition to a Final exam, students will have to complete individual assignments and a research paper. See below for details

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	0.0 %	0 hours
Discussions	0.0 %	0 hours
Exercises	0.0 %	0 hours
Group work	0.0 %	0 hours
Other individual studying	0.0 %	0 hours
TOTAL	0.0 %	75 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Inequality: The Mother of all Evils?

Why & How Inequality Affects Democracy

Mandatory Readings:

- Piketty, T. (2012). Intro in *Capital in the 21st Century*, Harvard Univ Press
- Piketty, T. (2014). Capital in the Twenty-First Century: a multidimensional approach to the history of capital and social classes, *The British Journal of Sociology*, Volume 65 Issue 4
- Milanovic, B. (2016). Global inequality : A new approach for the age of globalization. Retrieved from http://ebookcentral.proquest.com Created from bibliotecaie-ebooks on 2019-11-20 06:01:35

Book Chapters: Piketty, T. (2012). Intro in Capital in the 21st Century, Harvard Univ Press (introduction) (ced)

Article: Capital in the Twenty-First Century: a multidimensional approach to the history of capital and social classes (The British Journal of Sociology) (ced)

Book Chapters: Inequality within Countries Introducing Kuznets Waves to Explain Long-Term Trends in Inequality (chapter 2) (ced)

SESSION 3 (LIVE IN-PERSON)

Debate 1: Inequality & You

Discussion on how Inequality affects each and everyone of us

SESSIONS 4 - 5 (LIVE IN-PERSON)

Anomie & Nationalism. Globalism Firesback

The Paradox of Choice: Why More Choice is not always Good

Mandatory Reading:

- Hirsch, P., Fiss, P. and Hoel-Green, A. (2009). A Durkhemian Approach to Globalization in *The Oxford Handbook of Sociology and Organization Studies: Classical Foundations* Edited by Paul Adler
- Ferraresi, M. (2020). Nationalists claim they want to redefine conservatism but they not sure what it is, *Foreign Policy* 4/10
- G. M. Tamás (2020). On Post-Fascism. How citizenship is becoming an exclusive privilege, *Boston Review Online*

Book Chapters: A Durkhemian Approach to Globalization (ced)

Article: Nationalists claim they want to redefine conservatism but they not sure what it is (Foreign Policy) (ced)

Article: On PostFascism. How Citizenship Became a Privilege (Boston Review) (ced)

SESSION 6 (LIVE IN-PERSON)

Debate 2: Students will present a 10-12 mins case on nationalism in a country of choice

SESSIONS 7 - 9 (LIVE IN-PERSON)

Populism & Democracy: Love Affair or Unhappy Marriage?

Mandatory Readings:

- Hanspeter Kriesi. 2014. The Populist Challenge. West European Politics. 37(2), 361-378
- Peter Mair. 2006. Ruling the Void. New Left review. no. 42, (2006): 25-52

- Canovan, Margaret (1999): Trust the People! Populism and the Two Faces of Democracy. Political Studies, 47(1), 2-16
- Rovira Kaltwasser, Cristóbal (2012) The ambivalence of populism: threat and corrective for democracy, Democratization, 19:2, 184-208

Recommended Readings:

- Huber, Robert A. and Christian H. Schimpf (2017). On the Distinct Effects of Left-Wing and Right-Wing Populism on Democratic Quality. Politics and Governance 5(4)

- Martinez-Tapia, O. (forthcoming), Nationalism, Populism and Retro-utopianism (working paper)
- Rovira Kaltwasser, Cristóbal (2014). The Responses of Populism to Dahl's Democratic Dilemmas. Political Studies 62, pp. 470–487

Article: The Populist Challenge (West EuropeanPolitics) (ced)

Article: The Ambivalence of populism (Democratization) (ced)

Article: Trust The people! (Political Studies) (ced)

Article: Ruling the Void? (new left review) (ced)

Article: Populism & Quality of Democracy (Politics and Governance) (ced)

Article: Populism & Dahl's Democratic Dilemma (POLITICAL STUDIES) (ced)
Working Paper: How populist voters understand democracy. Evidence from Europe

SESSION 10 (LIVE ONLINE)

Debate 3: Direct Democracy

Mandatory Readings:

- Altman, David (2010). Direct Democracy World Wide. Cambridge University Press. pp.41-59

- Schiller, Theo (2011). Democracy, Direct. In: Bertrand Badie, Dirk Berg-Schlosser & Leonardo Morlino (eds).: International Encyclopedia of Political Science. Sage Publications. pp. 559- 564
- Geibel, B., Kramling, A. & Paulus, L. (2019). It Depends...Different Direct Democratic Instruments and Equality in Europe from 1990 to 2015, *Politics and Governance* (ISSN: 2183–2463) 2019, Volume 7, Issue 2, Pages 365–379

Book Chapters: Direct Democracy. More and Better democracy? (ced)
Article: It Depends...Different Direct Democratic Instruments and Equality in Europe from 1990 to 2015 (Politics and Governance) (ced)
Book Chapters: Direct Democracy (ced)

SESSIONS 11 - 12 (LIVE IN-PERSON)

Cultural Marxism: Why Too Many Hypsters May Hurt Democracy?

Mandatory Readings:

- 'Cultural Marxism': a uniting theory for rightwingers who love to play the victim, Jason Wilson, *The Guardian*, 19 Jan. 2015
- The Dark Enlightenment, by Nick Land (www.thedarkenlightment.com)
- I'm a PhD student, and I can't wait to vote for Donald Trump, Pete Calautti, *Vox* Apr 4, 2016

Article: Cultural Marxism (The Guardian, Mon 19 Jan 2015)
Multimedia Documentation: The Dark Enlightenment
Article: Im a PhD Student and I can't wait to vote for Donald Trump (vox.com, Apr 4, 2016)

SESSION 13 (LIVE IN-PERSON)

Homo-Nationalism & White Environmentalism: The World Upside-down?

- How Gay Icon Renaud Camus Became the Ideologue of White Supremacy. The bizarre odyssey of the "great replacement" theorist shows that kitsch can kill, James McAuley, *The Nation*, June 2019

- Rainbows and Racism Marched Together in Sweden During LGBT Pride Week. What we saw when a march, organised by a right-wing nationalist under an LGBT Pride banner, met its counter-protest, Weronika Pérez Borjas, *Vice*, July 2016

- Environmentalism & White Nationalism: A shared Destiny, Michale Walker, *Counter-Currents*, Sept. 2018
- Environmental Racist History, Jedediah Purdy, The New Yorker, Aug. 2015

Article: How Gay Icon Renaud Camus Became the Ideologue of White Supremacy (The Nation, JUNE 17, 2019)

Article: Rainbows and Racism Marched Together in Sweden During LGBT Pride Week (Vice, July 30, 2016)

Article: Environmentalism & White Nationalism: A Shared Destiny (Counter-Currents, September 10, 2018)

Article: Environmentalism Racist History (The New Yorker, August 13, 2015)

SESSION 14 (LIVE IN-PERSON)

Retro-Utopianism: Everything Was Better Back When Everything Was Worse

Mandatory Readings:

- Francis Fukuyama Postpones the End of History, Loise Menard, *The New Yorker*, Aug. 2018
- Bell, D. (1971), The Cultural Contradictions of Capitalism, NY. Basic Books pp- 16-43

- Jordan Peterson, Custodian of the Patriarchy, Nellie Bowles, *The New York Times*, May 18, 2018

Article: Francis Fukuyama Postpones The End of History (The New Yorker, August 27, 2018)

Multimedia Documentation: Jordan Peterson, Custodian of the Patriarchy (The New York Times, May 18, 2018)

Book Chapters: The Cultural Contradictions of Capitalism (ced)

SESSION 15 (LIVE IN-PERSON)

 FINAL EXAM

EVALUATION CRITERIA

Final Exam (45%)

Students will be evaluated on the basis of an essay midterm exam. Students will be given FIVE questions a week before the exam from which the professor will select TWO for the examination. Ability to put an argument together alongside with the knowledge as well as topic connections will be valued. Student will receive the grade within two weeks of the examination.

Research Term Paper (25%)

You are required to write a research term paper over the course of the semester. Final paper should have a working hypothesis that would be validated or not in the conclusion. The essay will be graded in view of their content, structure, sources, references, and writing style. See "Research Paper" document in the web of our course for details.

Participation & Discussion (15%)

You are required to read all texts of the seminar and participate in the debates in class as well as delivering reading responses in the form requested by you professor. Further details regarding the reading statements, written assignments, standards for participation, and the exams will be provided at the beginning of the course.

IN-class Presentation (15%)

Students will have to present in class according to professor's directions

Criteria	Percentage	Comments
Final Exam	45 %	
Research Paper	25 %	
Individual Work	20 %	
Class Participation	15 %	

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course. Students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade. Dates and location of the final exam will be posted in advance and will not be changed. Students must attend at least 70% of the sessions. Students who do not comply with the 70%attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year). Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today ?s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goal 1 (end of poverty), 2 (hunger zero) and 5 (gender equality), 10 (inequality reduction) and 16 (peace, justice and better institutions). Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

Attendance is mandatory at IE University, as it is an essential factor of IE ?s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session.
Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other cases of force majeure, are to be consulted with the Program Management (bir.madridoffice@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility). Grading for retakes will be subject to the following rules:

The retakes will consist of a comprehensive exam. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.

The exam will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

Dates and location of the retakes will be posted in advance and will not be changed.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

providing faulty sources;

copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;

copy-pasting material from external sources even while citing them;

using verbatim translations from sources in other languages without citing them;

copy-pasting material from external sources without citing them;

and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. The professor will advise the student on how to present said material. All written assignments have to be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **OSCAR MARTINEZ TAPIA**

E-mail: omartinez@faculty.ie.edu

OSCAR MARTINEZ TAPIA

Oscar Martínez-Tapia received a PhD in political science from Universidad Complutense de Madrid, where he also received a BA degree in Political Science and International Relations. In between, he received a Masters degree in Government from the University of Manchester (UK). He has been visiting fellow at the Center for the Study of Democracy (Univ. California, Irvine) and Harvard University. Outside academia, he has served as Communication Advisor (speechwriter) for the Vicepresident of Spain from 2005 to 2007. His research focuses on comparative analysis of parties and party systems with special attention to nationalist parties in Western Europe.

OFFICE HOURS: upon request.

Contact details: omartinez@faculty.ie.edu

OTHER INFORMATION
CODE OF CONDUCT IN CLASS

1. Be on time: : Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor).

2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4. If connecting remotely, leave video feed on at all times.

5. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the professor as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

6. Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

7. No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

8. Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

NEW TECHNOLOGY, HUMAN RIGHTS, AND HUMANITARIAN LAW

IE University
Professor: **BORISLAVA KROUMOVA DJONEVA**

E-mail: bkroumova@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

The course is open to all IE students interested in the human rights dimensions of the development of new technologies. While it is an advantage to have some basic knowledge of International Public Law, it is not a prerequisite. It is also of benefit to have some prior knowledge of the main global and some regional international mechanisms and key players such as the UN, the Special agencies, ICRC, EU, WEF, NATO, etc.

SUBJECT DESCRIPTION

In the last decade technologies have become a key factor for economic, social and political advantage on international arena. Every single day our society is faced with the fast and continuous introduction of new elements breaking the lines between the virtual and the non-virtual world. This raises questions of moral, political, financial and legal nature that no one could have imagined just a few years ago. Many are still awaiting answers, but legal experts have come up with at least some provisional measures which give some shape and direction to the debate. In order to create some sense of the boundaries between legal and illegal, the internationally-recognized, the prohibited, and the awkward space between them, the course has been designed from two different dimensions – technological and legal.

Technical developments subject to discussion shall be the use of internet, biometric data, personal data protection, big data, drones, autonomous arms, artificial intelligence and to some extent - bio-technologies. Cybersecurity challenges in the context of the COVID- 19 pandemic and the current armed conflicts will be included in the debate. The functioning, the regulations, or the need of it, will be discussed from Human Rghts and Humanitarian Law perspective. Some legal comparisons such as "Drone legislation in various EU member states" or "Internet regulation project" will be introduced. The transversality of the course consists in exploring the existing relevant international law instruments within the Human Rights Law, International Humanitarian Law, EU Law, Collective Security and the UN Global Agenda.

OBJECTIVES AND SKILLS

The course on New Technologies, Human Rights and Humanitarian Law is designed to serve as a first step to some basic understanding of the complexity of the regulation of new technologies at a global level. It is intended to enable students to understand the human rights implications of new technologies and to respond to future technological challenges in the context of existing instruments of International Law. The second part of the course is focused on the use of the new technologies in armed conflicts, discussing their compliance with the internationally established humanitarian standards.

METHODOLOGY

Some reading is to be envisaged, although not on extensive scale. The course will be as interactive as possible with live debates, research options and some practical tasks. Several group projects and at least one case simulation are programed.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	32.0 %	24 hours
Discussions	21.33 %	16 hours
Exercises	13.33 %	10 hours
Group work	20.0 %	15 hours
Other individual studying	13.33 %	10 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)
Human rights – international system and functions. Universal Declaration of Human Rights 1947, UN HR legal framework, European Convention on Human Rights.

Book Chapters: Sir Nigel Rodley: International Human Rights Law, International Law, edited by Malcolm Evans (See Bibliography)

Other / Complementary Documentation: Office of the High Commissioner of Human Rights (legal instruments) (United Nations)

Other / Complementary Documentation: European Convention on Human Rights (European Court of Human Rights)

Book Chapters: Basic Human Rights (optional)

Basic approach to the fundamentals of human rights: Origins, development of the concept during the last three centuries; the Universal Declaration of Human Rights as a milestone in world history. The French Revolution and the US Constitution.

SESSION 2 (LIVE IN-PERSON)
Human identity and new technologies. Bio-metric data use and HR. What is electronic face-identification? Voice, finger prints, bio material – who owns our body ? Legal and moral controversy.

Other / Complementary Documentation: International Convent of Civil and Political Rights (United Nations)

Article: Is Species Integrity a Human Right? A Right Issue Emerging from Individual Liberties and

New Technologies (Human Rights Rev (2014) 15:177–199) (ced)

This session will be focused on the preservation of the species' integrity and the use of bio - material. Please, read the attached article in advance.

SESSION 3 (LIVE IN-PERSON)

The right of privacy. UN and European approach/GDPR. Privacy, elections' forecast and the right of democracy. Case study on the right of privacy. Big data and HR.

What is a big data and how does it function? Use in different political systems. Big data in urban areas and big data for security purposes.

Other / Complementary Documentation: International Convent of Civil and Political Rights (United Nations)

Other / Complementary Documentation: The Rights of the European Citizens (data protection) (European Commission)

Technical note: Directive 95/46/EC (General Data Protection Regulation) (Text with EEA relevance)

Technical note: The Carter Center´s Global Standard of Democratic Elections

Article: The Panopticum is already here. The Atlantic, September 2020 (The Atlantic, 2020)

Cambridge analytica case. European Court of Justice admission to jurisprudence: landmark case. Challanges in the post-COVID 19 era.

Prior to the session, students will be distributed tasks on the Big data use and regulation in a freely chosen state.

SESSION 4 (LIVE IN-PERSON)

The right to development and the NT. The NT as a catalyst for development.

Other / Complementary Documentation: The UN Declaration on the Right to Development, General Assembly resolution 41/128

Article: The Third Industrial Revolution (The Economist, Apr 21st 2012) (ced)

Technical note: The UN Global Agenda 2030

The NT and the UN Development Agenda 2030. COVID19, digital transformation and the impact on Development Goals.

SESSION 5 (LIVE IN-PERSON)

Robots and the future. Artificial Intelligence. Distant or not that distant reality? What is the real status quo and how it would affect the basis of the HR framework.

Book Chapters: The Fourth Industrial Revolution (See Bibliography)

Book Chapters: Life 3.0 (optional) (See Bibliography)

Update on the current developments of the AI - related legislation and ethics.

SESSION 6 (LIVE IN-PERSON)

Drones. History. Basic rules and drones classification. Civil use. Pros and contras. Human Rights and drones.

Article: Ethics for civil indoor drones: A qualitative analysis (International Journal of Micro Air Vehicles) (ced)

Book Chapters: The future of drone use: opportunities and threats from ethical and legal perspectives, 2016 (optional) (IE Library)

SESSION 7 (LIVE IN-PERSON)

Debate on the privacy, human identity and HR. Drones legislation in various European states, US, Japan and Latin America.

Other / Complementary Documentation: European Union Drone Legislation (Drone Rules)

Other / Complementary Documentation: Federal Aviation Agency, US Government regulation (United States Department of Transportation)

Student presentations and some discussion on the interrelation between drones, privacy and HR.

SESSION 8 (LIVE IN-PERSON)

Humanitarian law and why we should be familiar with it in the era of the technological boom. Basic concepts of International Humanitarian Law: ius belli and ius in bello.

Article: The Geneva Conventions of 1949 and their Additional Protocols (ICRC, 2010)

Article: The Practical Guide to International Humanitarian Law (Medecins sains frontieres)

SESSION 9 (LIVE IN-PERSON)

What is a cyberwar and how it could be qualified by the International law standards. Are the victims of a cyber-attacks war victims?

Book Chapters: From Cold War to cyber war: the evolution of the international law of peace and armed conflict over the last 25 years (IE library)

SESSION 10 (LIVE IN-PERSON)

New generation arms. Remote controlled arms. Drones in battles. UN Conference of Disarmament. Conventional weapons.

Other / Complementary Documentation: Study on Armed Unmanned Aerial Vehicles (UN Office on Disarmament Affairs)

Working Paper: An Action Plan on US Drone Policy: Recommendations for the Trump Administration (Stimson)

Article: Drones in humanitarian contexts, robot ethics, and the human–robot interaction. (Ethics and Information Technology, 22, 2020, p. 43-53, Springer)

SESSION 11 (LIVE IN-PERSON)

Arbitrary executions and selected killings by unmanned areal vehicles (arms) – Ukraine, Pakistan, Yemen, Palestine and other cases. Current developments on the concept of war.

Other / Complementary Documentation: Draft Convention on Crimes Against Humanity (International Law Commission)

Article: Drone strikes on Yemen don't make my country safer – or yours (The Guardian, Fri 10 Aug 2018)

Article: Enhancing Biological Weapons Defense (Lawfare, July 16, 2020)

SESSION 12 (LIVE IN-PERSON)

Robots in war. Is it worth the exercise? Enhanced human being potential technics in war.

Article: Autonomous weapons systems, killer robots and human dignity. (Ethics and Information Technology (2019) 21:75–87) (ced)

See also the articles from i) session 10: *Drones in humanitarian contexts, robot ethics, and the human–robot interaction*, Ethics and Information Technology, 22, 2020, p. 43-53, Springer and from ii) session 11: *Enhancing Biological Weapons Defence*, Lawfare, July, 2020

SESSION 13 (LIVE IN-PERSON)
International arms trade - challenges and practice . International Law perspective.

Article: Financail value of the global arms trade (SIPRI)

Other / Complementary Documentation: Arms Trade Treaty (UNODA)

SESSION 14 (LIVE IN-PERSON)
Perspectives for the development, NT and HR. UN Secretary General's Strategy on New Technologies

Article: Complementing the surveillance law principles of the Court of Strasbourg with its environmental law principles. An integrated technology approach to a human rights framework for surveillance (Utretch Law Review) (ced)

Working Paper: 2012 The right to benefit from scientific progress and its applications (United Nations)

Other / Complementary Documentation: UN Secretary General's Strategy on New Technologies (United Nations)

SESSION 15 (LIVE IN-PERSON)
Final exam.

Other / Complementary Documentation: Declaration on the Use of Scientific and Technological Progress in the Interests of Peace and for the Benefit of Mankind, GAR 3384, 10 November 1974 (United Nations)

End of term remarks.

BIBLIOGRAPHY
Recommended

- Sir Nigel Rodley for the book edited by Malcolm Evans. *International Law, International Human Rights (chapter).* Oxford University Press. ISBN 9780198791836 (Printed)

    null
- Klaus Schwab. *The Fourth Industrial Revolution.* ISBN 9780241300756 (Printed)

    null
- Max Tegmark. *Life 3.0.* New York Vintage Books. ISBN 9781101970317 (Printed)

    null
- MSF /FRANÇOISE BOUCHET-SAULNIER. *The Practical Guide to Humanitarian Law.* Rowman&Littlefield. ISBN 9781442221130 (Digital)

EVALUATION CRITERIA

All programmed group presentations will be graded. A mid-term short paper is scheduled before session 8. Extra research will be positively considered.

Students will also take a final exam. This exam will consist of a choice between two essay questions, each corresponding to the respective program content.

Ultimately, there will be a participation grade based on class attendance, input, behavior and interesting contributions to class discussions.

Criteria	Percentage	Comments
Final Exam	30 %	
Group Presentation	20 %	
Intermediate Tests	20 %	
Class Participation	15 %	
Individual Work	10 %	
Exeptional input	5 %	

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade. Dates and location of the final exam will be posted in advance and will not be changed.

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ATTENDANCE

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For more information about the university attendance policy, please check; https://www.ie.edu/student-guide/bir/policies-and-guidelines/attendance/

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

- The retakes will consist of a comprehensive exam or equivalent assignment. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.
- Dates and location of the retakes will be posted in advance and will not be changed.
- The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **BORISLAVA KROUMOVA DJONEVA**

E-mail: bkroumova@faculty.ie.edu

BORISLAVA KROUMOVA DJONEVA

Borislava Djoneva has law degrees from the University St. Climent, Sofia and UNED, Madrid and has specialized diplomacy at the University of Oxford, UK. During her career as an international law advisor and diplomat she has drafted and/or negotiated more than 30 bilateral and multilateral agreements. Ms. Djoneva has published numerous articles on international affairs and law. In the period 2018 - 2021 she has co-chaired the EUFASA Working Group of Legal Matters.

OTHER INFORMATION

Office hours: Please request appointment prior to.

bkroumova@faculty,ie.edu

CODE OF CONDUCT IN CLASS

1.   Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.

2.   If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3.   Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4.   Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

5.   Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

6.   No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

7.   Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

POLITICS AND SOCIETY IN SUB-SAHARAN AFRICA

IE University
Professor: **GRACE OBADO**

E-mail: gobado@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 6.0
Language: English

PREREQUISITES

Basic knowledge of Africa's history, geography, economy, politics, society and diverse culture is recommended.

SUBJECT DESCRIPTION

Mainstream media quite often depicts Africa as a continent replete with conflicts and poor governance. But in reality, what's the quality of political institutions, and how many armed conflicts are there in Africa today? On average, since the 90s armed conflicts have been falling, albeit a sharp increment in 2005, which still stands lower than the 1990s peak. Does this mean that governance is improving and armed conflicts are on the decline in the region? This course will go beyond media headlines and offer a comprehensive insight and analysis of governance and society and political conflicts in Sub-Saharan Africa. It will do so by focusing on political systems, African society, the nature of conflicts, actors, drivers, and their impact on the continent. We will also evaluate international and regional peacekeeping and peacemaking operations with a particular focus on the role of women in peacebuilding, with the objective of exploring innovative ways of achieving inclusive and long-lasting peace. The main topics will include a historical overview of governance and society and political conflict in Africa. We will also look at the role of mass media in political conflicts with a detailed analysis of ethnic conflicts and secession in the African context.

OBJECTIVES AND SKILLS

Upon completion of this course, students will be able to:

- Acquire a broad based-based knowledge and analysis of Africa's political systems, nature of political institutions and political conflicts in Sub-Saharan Africa.

- Distinguish the types of political systems and political conflicts in Sub-Saharan Africa (INTER/INTRA)

- Evaluate the impact of political systems on the transformation of African society in the 21st century.

- Identify and examine the major actors of political conflict in Africa (Social groups, political parties, political representatives, citizens or insurgencies)

- Understand secession within an African context.

- Analyze conflict management and peacekeeping operations in Africa.

METHODOLOGY

This course will be conducted in the following formats:

a.) Face-to-Face

b.) Asynchronous Sessions

*Face-to-Face synchronous sessions will be conducted in a seminar/ lecture format. All students are expected to read the corresponding readings ahead of each session. Please note that it's mandatory for all students to participate in teamwork. Specific case studies (as reflected in the course syllabus) will be assigned to each group during the first two weeks of the course.

*Asynchronous SessionsAsynchronous sessions do not take place in a fixed, 80-minute time slot; students can complete them at different times, though the range of time should
be fixed. They resemble 'activities' rather than traditional classroom sessions. These activities can come in any number of forms: For example, recorded lectures, peer review of students' recorded presentations, watching documentaries and then responding to quizzes or writing short essay

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	10.0 %	15 hours
Discussions	4.67 %	7 hours
Exercises	13.33 %	20 hours
Group work	8.0 %	12 hours
Other individual studying	14.0 %	21 hours
TOTAL	50.0 %	150 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction: Politics and Society in Africa (Lecture and Discussion)

- Cultural Diversity

- Influence of the International System in Africa

- A continent in Transformation

Book Chapters: African Politics and Society: A Mosaic in Transformation (Chapter 1: Understanding African Politics and Society) (See Bibliography)

SESSION 2 (LIVE IN-PERSON)

Impact of colonization on political regimes and society in the post-independence era (Lecture & Discussion)

Video: The Scramble for Africa: A history of independence (Youtube)

Book Chapters: African Politics and Society: A Mosaic in Transformation (Chapter 3: Political and Economic Impact of Colonization) (See Bibliography)

Documentary

SESSION 3 (LIVE IN-PERSON)

The Cost of Colonization of French West Africa- Case (Lecture, Case & Discussion**)**

Article: Black man's burden: The cost of colonisation of French West Africa (The Journal of Economic History) (CED)

SESSION 4 (LIVE IN-PERSON)

African Political Thought (Lecture & Discussion)

- Indigenous and Modern African Political Thought

- Ideologies that Undergirded Ancient African Political Systems from Antiquity to the Nineteenth Century

- Contributions of Western Thinkers to Modern African Political Thought

Book Chapters: African Political Thought (Chapters 1-3) (See Bibliography)

SESSION 5 (LIVE IN-PERSON)

African Political Thought Cont'd (Cases & Discussion)

- Pan-Africanism and African Unity (Chapter 4) **Group assignment**

- Socialist- Populist Ideology (Chapters 5 & 6) **Group assignment**

- Populist- Socialist Ideology Chapter 7) **Group assignment**

- Africanist- Populist Ideology (Chapter 8) **Group assignment**

Book Chapters: African Political Thought (Chapters 4-8) (See Bibliography)

SESSION 6 (ASYNCHRONOUS)

Politics of the African Novel (Asynchronous Assignment)

Peer review of students' recorded presentations on the political themes of African Novel- 36 Hours - Discussion Board

- Political Themes of African Novel during Early Years

- Emergence of the politically Committed African Novelists

- Politics of the African Novel in Perspective

Book Chapters: African Politics and Society: A Mosaic in Transformation (Chapter 7: Politics of the African Novel) (See Bibliography)

SESSION 7 (LIVE IN-PERSON)

Political Regimes in Independent Africa (Lecture & Discussion)

Book Chapters: African Politics and Society: A Mosaic in Transformation (Chapter 10: Democracy Experiences and Multiparty Politics) (See Bibliography)

SESSION 8 (LIVE IN-PERSON)

Democratization in Africa (Lecture & Discussion)

Book Chapters: Democracy and Elections in Africa (Chapter 2) (IE Library)

SESSION 9 (LIVE IN-PERSON)

Democratization Cases (Mauritius and Somalia)- (Lecture and In-class presentation)
Book Chapters: Democratization in Africa. Chapters 1, 5 & 8 (See Bibliography)

SESSION 10 (LIVE IN-PERSON)

 Civil Society and State in Africa (Lecture & Discussion)
Book Chapters: Africa in World Politics (In pursuit of Autonomy: Civil Society and State in Africa).
Chapter 6 (See Bibliography)

SESSION 11 (ASYNCHRONOUS)

 Identity, Ethnicity, and Class (Asynchronous assignment)
Peer review of students' recorded presentations on the political themes of African Novel- 36 Hours -
Discussion Board
 - Ethnic dimension of African politics and society
 - Ethnic intermediaries and the creation of ethnic compacts
 - Class divisions in African society
 - Class cooperation and conflict
Book Chapters: Political Parties in Africa: Ethnicity and Party Formation. Chapter 1 (IE Library)

SESSION 12 (LIVE IN-PERSON)

 Dominance of Ethnic and Nonethnic parties (Cases: Kenya, Ghana, and Namibia)
Book Chapters: Political Parties in Africa: Ethnicity and Party Formation. Chapters 3 - 5 (IE Library)

SESSION 13 (LIVE IN-PERSON)

 Religion and Politics in Africa (Lecture, Case & Discussion)
Book Chapters: African Political Thought (Chapter 2: The Influence of Islamic Values and Ideas on
Indigenous African Systems and Institutions from the 10th -19th Century) (See Bibliography)

SESSION 14 (LIVE IN-PERSON)

 Women and Gender in Pre-Colonial Africa (Lecture &Discussion)
Book Chapters: African Politics and Society: A Mosaic in Transformation (Chapter 2: Women and
Gender-Pages 42-44) (See Bibliography)

SESSION 15 (LIVE IN-PERSON)

 African Women in politics in the 21st Century (cases)
Article: Women and Politics in Africa: The Case of Uganda - Parliamentary Affairs, Volume 55, Issue
1, 1 January 2002, Pages 119–128 (Parliamentary Affairs, Volume 55, Issue 1, 1 January 2002,
Pages 119–128) (CED)
Article: Women in Politics in Kenya: an Analysis of Participation and Barrier (Multidisciplinary Journal
of Gender Studies Vol. 7) (CED)

SESSION 16 (LIVE IN-PERSON)

MID TERM EXAM

SESSION 17 (LIVE IN-PERSON)

Ideology and Politics of Development (Lecture & Discussion)
- Evolution of African Development ideologies
- Ideology and development choice
- Ideology and development performance

Book Chapters: African Politics and Society: A Mosaic in Transformation (Chapter 6) (See Bibliography)

SESSION 18 (LIVE IN-PERSON)

Trends that are Transforming African society in the 21st Century:
Economic and Population Growth (Lecture & Discussion)

Article: Harnessing the Demographic Dividend in Africa through Lessons from East Asia's Experience. (Journal of Comparative Asian Development) (CED)
Video: Don't Panic- Hans Rosling (Outside Class Viewing) (Youtube)

SESSION 19 (LIVE IN-PERSON)

Urbanization in Africa (Lecture & Case)

Book Chapters: Africa's Business Revolution: How to Succeed in the World's Next Big Growth Market (Chapter 2 - Trend 1) (IE Library)

SESSION 20 (LIVE IN-PERSON)

Digital Adoption (Lecture & Case)

Book Chapters: Africa's Business Revolution: How to Succeed in the World's Next Big Growth Market (Chapter 2, Trend 5) (IE Library)

SESSION 21 (LIVE IN-PERSON)

Digital Adoption (Lecture & Case)
The impact of and frugal technology on African societies

Article: Frugal Innovation and Development: Aides or Adversaries? (European Journal of Development Research (2016) 28, 143–153) (CED)
Article: Sustainable Energy Solutions: Akon Lighting AfricaDecision (Official Journal of Indian Institute of Management Calcutta 46, no. 3 (2019): 253–66) (CED)

SESSION 22 (LIVE IN-PERSON)

Challenges facing African society in the 21st Century:
Political Conflict (Lecture & Discussion)
Overview of violent conflicts in Africa

Book Chapters: War and Conflict in Africa. Part I: Contexts- Chapters (1 & 2) (See Bibliography)

SESSION 23 (LIVE IN-PERSON)
Nature and Causes of conflicts in Africa (Case- Sierra Leon Leon)- Neopatrimonialism
(Lecture, Cases, and Discussion)

Book Chapters: War and Conflict. Part II- Ingredients- Chapter 3 (See Bibliography)

SESSION 24 (LIVE IN-PERSON)
Peacemaking and Peacebuilding (Lecture & Debate)
Book Chapters: Towards a New Pax Africana : Making, Keeping, and Building Peace in Post-Cold War Africa. Policy Research Seminar Report, No. 46. Cape Town, South Africa. (IE Library)
Article: UN Peacekeeping in Africa and Good Governance : Challenges and Prospects. (Potchefstroom Electronic Law Journal 2 (1): 1–48)
Article: African Union and Conflict Management in Africa : An Analysis (Journal of African Union Studies 10 (1): 71–88) (CED)

SESSION 25 (LIVE IN-PERSON)
Political Stability:
Terrorism (Cases) - (Lecture & Cases)
Book Chapters: Al-Shabaab in Somalia : the history and ideology of a militant Islamist group, 2005-2012 (IE Library)
Book Chapters: Boko Haram The Rise, Success, and Continued Efficacy of the Insurgency in Nigeria (IE Library)

SESSION 26 (LIVE IN-PERSON)
Climate Change in Africa (Lecture & Case)
Pastoral Conflicts
Book Chapters: War and Conflict / Chapter 4- Pages 105-113) (See Bibliography)

SESSION 27 (LIVE IN-PERSON)
Africa in world politics (Lecture & Discussion)
Book Chapters: Africa in world politics (Part i, Chapters 1 & 2) (See Bibliography)

SESSION 28 (ASYNCHRONOUS)
China in Africa
Peer review of students' recorded presentations on China in Africa- 36 Hours - Discussion Board
Book Chapters: China's Second Continent: How a Million Migrants Are Building a New Empire in Africa. New York: Knopf, 2014. (IE Library)
Working Paper: China, Africa, and the International Aid (African Development Bank Group, No 107 - April 2010)

SESSION 29 (LIVE IN-PERSON)
Review session

SESSION 30 (LIVE IN-PERSON)

 FINAL EXAM

BIBLIOGRAPHY
Compulsory
 - Schraeder, Peter J.. (2004). *African Politics and Society: A Mosaic in Transformation.* 2nd ed.. Wadsworth. ISBN 9780534567699 (Printed)

   null
 - Guy Martin. (2012). *African Political Thought.* First. Palgrave Macmillan. ISBN 9781403966339 (Digital)

   null
 - Paul D. Williams. (2016). *War and Conflict in Africa.* 2nd ed.. Polity Press. ISBN 9781509509041 (Printed)

   null
Recommended
 - Arriana Lissoni, Jon Soske, Natasha Erlank et Al.. (2011). *One Hundred Years of ANC: Debating Liberation Histories Today.* First. Wits University Press. ISBN 9781868146000 (Digital)

   null
 - Diamond, L. and Plattner, Marc F.. (1999). *Democratization of Africa: Progress and Retreat.* 2nd ed.. John Hopkins University Press. ISBN 9780801894931 (Digital)

   null
 - John W. Harberson and Donald Rothchild. (2017). *Africa in Word Politics.* Sixth. Westview Press. ISBN 9780813350288 (Digital)

   null

EVALUATION CRITERIA

 A) CLASS PARTICIPATION

 Participation will take place in Face-to-Face sessions and in the asynchronous sessions through using the discussion board.

 Three main criteria will be used in reaching judgment about your class participation:

Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high-quality comment reveals the depth of insight, rigorous use of case evidence, consistency of argument, and realism.

Moving Your Peers' Understanding Forward: Great ideas can be lost through a poor presentation. A high-quality presentation of ideas must consider the relevance and timing of comments and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.

Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once the threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

B) GROUP PRESENTATIONS

Each group must present one case in a Face-to-Face session and another case (recorded presentation) in an asynchronous session (Session 4).

Good case briefs are concise, but also provide a fact-based rationale for your recommendations and implementation plan. The rationale should reflect a good understanding of the important issues of the case and may integrate previous material from the class or your experience. You might also note factors that argue against your recommendation, and how your implementation plan might minimize the impact of these factors.

C) MIDTERM & FINAL EXAMS

Both midterm and Final exams will be Face-2-Face but if the circustances do not allow, they will be held online.

The evaluation will be based on class participation, Group Write-ups and Presentation and l Exams as indicated below:

Criteria	Percentage	Comments
In-class + Forums	10 %	
MIDTERM EXAM	20 %	
Synchronous Group Presentation	20 %	
Asynchronous Group Presentation	20 %	
FINAL EXAM	30 %	

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade.

Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today´s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goal 1,5,8,9,10,15,16 &17. Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

Attendance is mandatory at IE University, as it is an essential factor of IE´s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session.

Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other cases of force majeure, are to be consulted with the Program Management (bir.madridoffice@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

- The retakes will consist of a comprehensive exam or equivalent assignment. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.
- Dates and location of the retakes will be posted in advance and will not be changed.
- The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY
Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;

- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

FLEXIBILITY

Course structure will be adaptable to the public health situation.

If social distancing is no longer necessary, the split Face-to-Face sessions will be re-combined. If COVID-19 returns, we will be fully prepared to effectively transfer Face-to-Face sessions to Videoconferences.

PROFESSOR BIO

Professor: **GRACE OBADO**

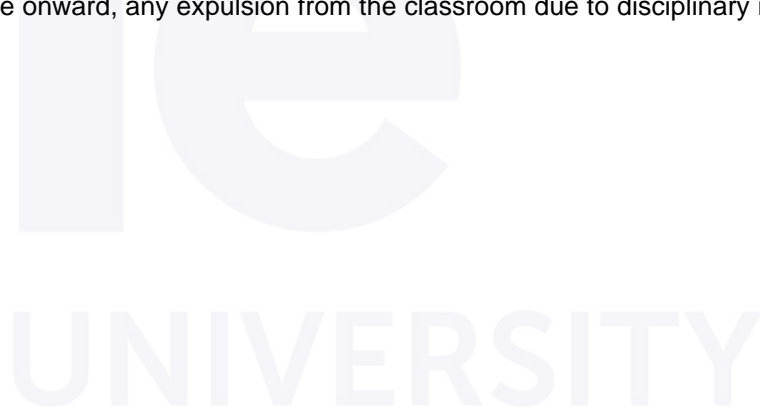E-mail: gobado@faculty.ie.edu

BEATRICE GRACE ALUOCH OBADO

Grace Obado holds a BA (Licenciatura) in Political Science and Sociology, A postgraduate Diploma in Human Rights, and Ph.D. studies in International Relations, all from Universidad Complutense de Madrid. She is Associate Professor of International Relations and Sustainable Development at IE University and IE Business School. She serves on the board of Africa 2.0 International Foundation and Oryx Impact. She also sits on the advisory board of Spain's Casa Africa. She has spoken at many conferences in Africa, Europe, Asia and the USA, including most recently, Africa in the perspective of G20 Conference and Africa Business Conference at Harvard Business School.

OTHER INFORMATION
CODE OF CONDUCT IN CLASS

1. Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor).

2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

5. Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

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The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

PUBLIC AFFAIRS AND LOBBYING

IE University
Professor: **MIGUEL GIMENEZ DE CASTRO**

E-mail: mgimenezd@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

In general, there are no mandatory prerequisites.

Students are recommended to refresh the concepts studied at "PUBLIC OPINION AND POLITICAL COMMUNICATION" and "INTERNATIONAL INSTITUTIONS AND GLOBAL GOVERNANCE" courses if they have attend them.

SUBJECT DESCRIPTION

Public Affairs, jointly with Communications, are increasingly the most strategic functions in today's business. Public Affairs professionals not only aim to influence public policy, but also build and maintain strong relationships with key stakeholders and reinforce a company's reputation. Therefore, to understand and manage political, regulatory and competitive environments is key in order to better anticipate challenges and opportunities, and maximize and deliver business-value for companies, in the long term and in a sustainable manner.

The Public Affairs function, now a days, englobe the management of all the relationships an organization (public or private) has with all its key stakeholders, and combines different disciplines such as government relations, stakeholders management, media communications, crisis management, corporate and social responsibility, and strategic corporate communications advice.

This course will provide students a core background in the central topics of Public Affairs and the knowledge to elaborate a professional Public Affairs Strategy.
We will start revising the basic concepts in Public Affairs, Lobby and Advocacy, and how this function fits in a company ?s organization. Afterwards, we will focus on the process of policy formation and the wider corporate communications and reputational context in which public affairs operates. This will provide a broad foundation on which subsequent issues will be viewed.

We will discuss and work the different phases (research, planning, execution and evaluation), tactics, tools and disciplines required to define and implement a professional Public Affairs Strategy, in order to elaborate our own one. An analytical perspective is applied to encourage students to take a reflective approach in examining their own project.

We will also analyse the different regional and external factors (cultural, economic, political, social), with special focus in Middle East and Africa Regions, that need to be taken into consideration to define an effective International Public Affairs Strategy.

Finally, we will talk about Ethics and Transparency in modern Public Affairs and we analyse how we measure results (metrics).

Through the entire course we will discuss cases from different industries, sectors and countries to better understand and work the different concepts.

The course is designed to provide students with a deep understanding on the Public Affairs function as well as with the conceptual tools needed to design and implement a (local / international) Public Affairs strategy and execute effective lobby and advocacy campaigns. Students will learn how to engage with key stakeholders in order to explain organisational policies and views on public policy issues, assisting policy makers in amending or laying down better policies and legislations.

OBJECTIVES AND SKILLS

The aim of this course is to enable students to develop specialist knowledge and expertise in the contexts, concepts and practical tools of public affairs. It is designed for both generalist International Relations, Communication, Law or Business Administration students wishing to enhance their understanding of this discipline and for those willing to specialize in public affairs as a career.

Students will receive a strong foundation in Public Affairs, Lobby and Advocacy. Students will also analyze challenges and problems in Public Affairs and come up with possible solutions to those problems. This course will take a practical, interactive and applied approach to international Public Affairs through the analysis of case studies, presentations and active class discussion.

The aim of this course is that students:

- Get to know basic concepts in Public Affairs, lobby and advocacy. Understand the role of the public affairs function.
- Achieve a general understanding on typologies of political systems and government structures.
- Lear how to elaborate a Public Affairs Strategy and a lobby/advocacy campaign.Understand the policy formation and decision-making processes within these systems.
- Learn how to identify key stakeholders and define an effective stakeholder's management Plan.
- Become familiar with the tactics used in Public Affairs.
- Develop an understanding on regional external factors (cultural, political, economic, social)
that conditionate a Public Affairs Strategy, with special focus on
- Middle East and Africa Regions.
- Develop competences and abilities to influence effectively.Storytelling applied to Public Affairs
- How to operate ethically

METHODOLOGY

This course is designed an interactive lecture, with many elements of a seminar.

A typical session might begin with an introduction of the covered topics and an overview of the assigned readings done by the professor. From there, a talk will follow with remaining time devoted to class discussion or – during this time – students will engage in team projects that entail analysing a case study.

Lectures present the concepts, which are then crystallized during discussions.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	29.33 %	22 hours
Discussions	20.0 %	15 hours
Exercises	20.0 %	15 hours
Group work	20.0 %	15 hours
Other individual studying	10.67 %	8 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

Introduction to Public Affairs.
- Role and responsabilities of Public Affairs Department.

SESSION 2 (LIVE IN-PERSON)

Typologies of political and democratic systems and government structures

SESSION 3 (LIVE IN-PERSON)

Designing a Public Affairs Strategy Part I.
- Overview
- Goals Setting
- Defining Public Affairs Goals and KPIs
- Research Methodologies and Stakeholder Mapping/Analysis

SESSION 4 (LIVE IN-PERSON)

Designing a Public Affairs Strategy Part II
- Planning and Stakeholders Management
    - How to prepare a Public Affairs Plan
    - How to prepare a Stakeholders Engagement Plan
    - Executing and Budgeting a Public Affairs Plan
- Metrics

SESSION 5 (LIVE IN-PERSON)

Lobby
- Definition, Strategies and Tools.
- Lobby in the EU

SESSION 6 (LIVE IN-PERSON)

Practical Session. Lobby Exercise.
- Teams choose from a list of topics (e.g. VTC - Uber vs Taxi, Touristic Apartments - Airbnb vs Hotels/Neighbours, etc)
- Students will practice teamwork under pressure, and learn how to define key messages, prepare arguments in defence of their position, and draft an action plan (evaluate when, where and to whom)

SESSION 7 (LIVE IN-PERSON)

Public Affairs & Communications.

- Political Communication
- Storytelling for advocacy campaigns

SESSION 8 (LIVE IN-PERSON)

Advocacy.

- Definition, Strategies and Tools. Grassroots Advocacy: Definition, Strategies and Tools Grassroot Campaigns - Advocate Acquisition: Four Strategies to Grow Your Grassroots NetworkGrassroots Mobilization: How It Works

SESSION 9 (LIVE IN-PERSON)

Communications & Advocacy

- Advocacy, messaging and positioning
- Messaging for government and public affairs audiences
- Business Cases.

SESSION 10 (LIVE IN-PERSON)

Practical Session. Advocacy Exercise.

- Students have to prepare and present a Grassroot campaign.

SESSION 11 (LIVE IN-PERSON)

Corporate Reputation and Corporate Social Responsibility

- UN Sustainable Development Goals
- Thought-leadership and CEO-Activism

SESSION 12 (LIVE IN-PERSON)

Protocol and Business Culture in different regions.

SESSION 13 (LIVE IN-PERSON)

Crisis Management

SESSION 14 (LIVE IN-PERSON)

Lobby and Ethics. Towards responsible Public Affairs, Lobby and Advocacy

SESSION 15 (LIVE IN-PERSON)

Final Exam.

BIBLIOGRAPHY

Recommended

- Frank Luntz.. *Words That Work: It's Not What You Say, It's What People Hear.*
ISBN 9781401309299 (Digital)

- Moises Naim. *The End of Power: From Boardrooms to Battlefields and Churches to States, Why Being In Charge Isn't.* ISBN 9780465065684 (Digital)
- Stuart Thomson. *Public affairs : a global perspective.* ISBN 9781910692134 (Digital)
- Stuart Thomson, Steve John. *Public affairs in practice : a practical guide to lobbying.* ISBN 9780749444723 (Digital)
- Andreas Geiger. *EU lobbying handbook.* ISBN 9781475117493 (Digital)
- Phil Harris, Craig S Fleisher. *The SAGE Handbook of International Corporate and Public Affairs.* ISBN 9781473957916 (Digital)
- Juan Francés. *¡Que vienen los lobbies! : el opaco negocio de las influencias en España.* ISBN 9788423346271 (Digital)
- David L Helfert. *Political communication in action : from theory to practice.* ISBN 9781626376809 (Digital)
- Jonathan Gottschall. *The storytelling animal : how stories make us human.* ISBN 0544002342 (Digital)

EVALUATION CRITERIA

Evaluation is based on attendance, participation, team projects and final exam.
Participation and active involvement in class discussions are highly encouraged.

- Final Exam: 40%
- Class participation: 20%
- Intermediate Tests:Lobby Exercise: 20%
- Advocacy Exercise: 20%
- Class Participation (20%): Passive attendance to the class does not constitute participation. Students are expected to be very proactive and engaged in the class discussions, providing examples and contributing to enrich the discussion with thoughtful comments. Students may be called randomly during lecture to contribute to the class discussion. Furthermore, students might be asked to make short presentations to the class. Individual participation in these presentations will also be evaluated towards the participation grade.

Lobby and Advocacy Exercises (40% - 20% each exercise): There will be two practical sessions / exercises during the course.

Final Exam (40%): 10 questions questionaire on the subjects explained during the course.

Criteria	Percentage	Comments
Final Exam	40 %	
Individual Work	20 %	
Individual Work	20 %	
Class Participation	20 %	

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class, excluding the IR Unplugged and **BIR Electives**, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade. Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today´s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goals 16 and 17. Session 11 is dedicated to the UN SDGs and other sessions will refer to the goals as well. Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

In-person attendance is mandatory at IE University, as it is an essential factor of IE´s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session.

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- Dates and location of the retakes will be posted in advance and will not be changed.
- The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **MIGUEL GIMENEZ DE CASTRO**

E-mail: mgimenezd@faculty.ie.edu

MIGUEL GIMENEZ DE CASTRO

Academic Background

- B.A. Business Administration and Management - CUNEF (Spain)
- M.A in International Relations & Foreign Trade - Aliter International Business School (Spain) - Extension certificates in International Business Management - UCLA and UC Berkley (US)
- M.A in Political and Institutional Communication - Universidad Carlos III (Spain)
- Postgraduate degree in Public Affairs Management - ICADE / Mas Consulting (Spain).
- Master in Internet Business - ISDI

Academic Experience

- Collaborated and taught master-lessons at Escuela Internacional de Comunicación and CUNEF Alumni workshops.
- Since 2019, collaborates also with Universidad Europea de Madrid and ICAI in different programs.
     Corporate Experience

Endowed with more than 15 years of international experience in Public Affairs, Stakeholders Management and Corporate & Crisis Communications, mainly in Europe, Africa and the Middle East.

He has built up and manage the local and/or Regional Corporate Communication and Public Affairs departments for large industrial groups, such as Repsol, ArcelorMittal and thyssenkrupp, participating in projects in over 45 countries, and start-ups like Jannarelly Automotive, a low-scale sport car manufacturer based in Dubai.

He is currently Head of Communications at IBM for Spain, Portugal, Greece and Israel.

OTHER INFORMATION
CODE OF CONDUCT IN CLASS

1. Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.

2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

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PUBLIC DIPLOMACY AND NATION BRANDING

IE University
Professor: **ALANA MOCERI**

E-mail: amoceri@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
SUBJECT DESCRIPTION

Does having a positive reputation among foreign publics help a country achieve its foreign policy goals? Public diplomacy and nation branding and their relationship with soft power theory is one of the most contested subjects related to international relations. It is also a subject that is deeply misunderstood by the general public. Its concepts and theories draw from the work of scholars in political science, public relations and communication as well as practitioners from diplomatic corps around the world.

OBJECTIVES AND SKILLS

The immensely quotable title of Dale Carnegie's infamous book, "How to win friends and influence people" strikes at the core of soft power. Countries can sometimes get what they want not just by military force or economic might but by winning friends in the world and the influence that comes with the power of attraction. While the academic jury remains out in terms of putting evidence behind this idea that was originally conceptualized by Joseph Nye, countries all over the world spend taxpayer money on public diplomacy activities and nation branding in order to bolster their soft power. Cities, multinational companies, NGOs and other non-state actors are also practicing public diplomacy, sometimes helping and other times casting a shadow on their country's image. In this course, we will examine both the academic and profession side soft power, public diplomacy and place branding.

METHODOLOGY

I love teaching and approach it with an eye towards the skills you'll need for the future. With a phone in your pocket at all times, there is no need to memorize much of anything but no matter what you do, you will need to be able to think critically, communicate clearly and find ways to work productively in teams. This is why we'll discuss and debate the assigned readings and podcasts and why you will speak, write and present, sometimes on your own and others in teams. I believe that classes are learning communities that depend on the points of views and contributions from everyone in the group and that we can have a lot of fun while we do this.

The first five sessions of the course will focus on the concpetual and theoretical foundations of soft power and public diplomacy and the last ten sessions will focus on the practice of public diplomacy. I have assigned several podcasts that you can find free of cost on Apple Podcasts, Spotify and probably on other platforms. Most are about 30 minutes long and will bring to life the realities and current trends in PD. I have also assigned news articles and academic readings which will always have a class activity attached to them (quiz, dicussion, group work, etc) that I will announce as the course progresses. It looks like a lot but don't get overwhelmed! Many of these are optional and I have carefully curated the ones that are required. These will all count towards "in class actvities" grade. We will also have visits with practicing professionals from local embassies and other agencies and you will gain real-world experience with public diplomacy through a challenge based learning project with a public diplomacy team.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	13.33 %	10 hours
Discussions	20.0 %	15 hours
Exercises	20.0 %	15 hours
Group work	26.67 %	20 hours
Other individual studying	20.0 %	15 hours
TOTAL	100.0 %	75 hours

PROGRAM

FOUNDATIONS

In these sessions, we will study the concpetual and theoretical foundations of soft power, public diplomacy and place branding.

SESSION 1 (LIVE IN-PERSON)

China's Soft Power Push

This session will include a syllabus and reading quiz so please come prepared!

Article: China's Soft Power Push (Foreign Affairsv94 n4 (Jul/Aug 2015) 99-107) (CED)

Article: Why China's Global Image Is Getting Worse (Council on Foreign Relations, January 24, 2022)

SESSION 2 (LIVE IN-PERSON)

Why do countries want soft power?

Article: Soft power: the evolution of a concept (Journal of Political Powerv14 n1 (20210102): 196-208) (ced)

Podcast: People, Places, Power Episode 19: Public Diplomacy and Place Branding (Apple Podcasts)

Article: A Feminist Reformulation of Joseph Nye's Question: What is moral foreign policy? (Center on Public Diplomacy, May 21, 2020) (Optional)

SESSION 3 (LIVE IN-PERSON)
What does foreign public opinion have to do with soft power?

Article: Does Public Diplomacy Sway Foreign Public Opinion? Identifying the Effect of High-Level Visits (The American Political Science Reviewv115 n4 (Nov 2021): 1342-1357) (ced)
Article: In Search of Soft Power Does Foreign Public Opinion Matter for US Foreign Policy? (World Politics , July 2012, Vol. 64, No. 3 (July 2012), pp. 555-585) (ced) (Optional)

SESSION 4 (LIVE IN-PERSON)
Who practices public diplomacy?

Article: The Legitimacy and Effectiveness of Non State Actors and the Public Diplomacy Concept (Public Diplomacy Theory and Conceptual Issues. ISA Annual Convention, San Diego, April 1-4, 2012) (ced)
Podcast: People, Places, Power episode 10, Can individuals make a difference? (Apple Podcasts)
Article: The Boundaries of Public Diplomacy and Nonstate Actors: A Taxonomy of Perspectives. (International Studies Perspectives (2019) 20, 63–83) (ced) (Optional)
Article: Why Do We Need Non-state Actors in Public Theoretical Discussion of Relational, Networked Public Diplomacy (Journal of International and Area Studiesv22 n1 (20150601): 57-77) (ced) (Optional)

SESSION 5 (LIVE IN-PERSON)
Measuring soft power success

Podcast: People, Places, Power Episode 22: Meet the goodest, the Good Country Index for 2022 (Apple Podcasts)
Podcast: People, Places, Power Episode 23: Issues in the Index, the Nation Brands Index 2021 (Apple Podcasts)
Video: 2021 Report from the Elcano Royal Institute: "España: imagen y marca ¿Cómo nos ven, cómo somos? Encuesta Country RepTrak®" (Youtube) (Optional)

THE PRACTICE OF PUBLIC DIPLOMACY
In these sessions we will look at how public diplomacy is practiced via cases, guest speakers and projects.

SESSION 6 (LIVE IN-PERSON)
Guest speaker from local embassy (details TBA)

Podcast: People, Places, Power Episode 22, Systems and structures: organizing public diplomacy (Apple Podcasts)

SESSION 7 (LIVE IN-PERSON)
Cultural Diplomacy: intro and the case of Thailand's Pad Thai campaign

Podcast: People, Places, Power podcast: Episode 9: Culture, decorative or useful? (Apple Podcasts)
Article: Cultural diplomacy: beyond the national interest? (International Journal of Cultural Policy,

21:4, 365-381) (ced) (Optional)

SESSION 8 (LIVE IN-PERSON)

Cultural diplomacy: education and Spain's Casas

Article: Explaining Spain's Casas: An Instrument of Networked Public Diplomacy (The Hague Journal of Diplomacy, v10 n2 (2015 01 01): 215-224) (ced)

SESSION 9 (LIVE IN-PERSON)

Digital diplomacy

Podcast: #DigitalDiplomacy Podcast: Shaun Riordan on Strategic #DigitalDiplomacy (Apple Podcasts)
Podcast: People, Places, Power podcast: Episode 9: Digital disruption: new technology and the balance of soft power (Apple Podcasts)
Book Chapters: The Strategic Use of Digital and Public Diplomacy in Pursuit of National Objectives.(Optional)

SESSION 10 (LIVE IN-PERSON)

Media and international broadcasting

Podcast: People, Places, Power Episode 25 The media, friends of foe of country image? (Apple Podcasts)
Article: When Covid Hit, China Was Ready to Tell Its Version of the Story (The New York Times, 2021) (ced)
Article: Moceri, A.: What's at Stake for Spain's Global Image in the Dispute Over Catalonia (World Politics Review, Feb. 27, 2019)

SESSIONS 11 - 12 (LIVE IN-PERSON)

Group Presentations

SESSION 13 (LIVE IN-PERSON)

City diplomacy

Podcast: People, Places, Power Episode 6, Cities and International Image (Apple Podcasts)
Video: USC Annenberg Center for Public Diplomacy: City Diplomacy: Framework or Patchwork? (Youtube)

SESSION 14 (LIVE IN-PERSON)

Article: Public Diplomacy of Multilateral Organizations: The Cases of NATO, EU, and ASEAN (Center on Public Diplomacy at the Annenberg School, June 2015)
Article: Digital Diplomacy and International organizations (Center on Public Diplomacy, Mar 11, 2021) (Optional)

SESSION 15 (LIVE IN-PERSON)

Guest speaker: Spain audiovisual hub of Europe

Article: Moceri, A.: Spain Wants to Be Hollywood's Go-To Film Location (World Politics Review, June 9, 2022)

EVALUATION CRITERIA

Criteria	Percentage	Comments
In class activities based on readings and podcasts	20 %	This grade reflects scores on quizzes, activities and a pro-active contribution to class discussions based on the required readings and podcasts.
Embassy challenge	40 %	A representative from an embassy will give a talk about their work and also present a real-life public diplomacy challenge they are facing. You will work in groups to come up with a solution to this challenge which you will present to the embassy team during sessions 11 and 12 and receive feedback from them.
Paper	40 %	You will write a 2000-word paper comparing the public diplomacy programs of two countries.

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.
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PROFESSOR BIO

Professor: **ALANA MOCERI**

E-mail: amoceri@faculty.ie.edu

ALANA MOCERI

Alana Moceri is an international relations analyst, writer, and professor at the IE School of Global and Public Affairs. She has earned a reputation for distilling complex international trends and events to their core causes and practical impacts, guiding her students, readers, and viewers to understand the why, how, and what next of our interconnected world.

Ms. Moceri's main areas of expertise are politics and communication in the U.S., the EU, and Spain, including public diplomacy, global governance, electoral campaigns, public opinion, disinformation campaigns and grassroots and transnational activism. Bilingual in English and Spanish, she is a regular contributor to World Politics Review, Spain's leading daily newspaper El País, and top foreign affairs publication esglobal, among others and her work has been featured in Fareed Zakaria's Global Briefing newsletter. Ms. Moceri has also appeared on numerous TV and radio programs around the world, including Sky News, Television Española (TVE), Tele5, La Sexta, RT and VIVOplay. She has given a TEDx talk titled "Journalism for Action", is a member of the World Economic Forum's Expert Network and was recognized by the UCLA Alumni Association's 'Excellence in Action' series.

Ms. Moceri works in Madrid, Spain as a professor at IE School of Global and Public Affairs and has given guest lectures and seminars in Spain, the U.S. and Germany. She holds a BA in Political Science from UCLA, a master's degree in Politics and Democracy from UNED and is currently pursuing her PhD. She has worked both as a paid professional and as a volunteer on political and non-profit campaigns, including Barack Obama's ground-breaking presidential run in 2008. She founded Democrats Abroad Spain, which she led for five years and currently serves on the board of directors of THRibune, Tribune for Human Rights.

OTHER INFORMATION

Office hours available by appointment. Just contact me at: amoceri@faculty.ie.edu

SOCIAL ENTREPRENEURSHIP

IE University
Professor: **WAYA QUIVIGER**

E-mail: wquiviger@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

SUBJECT DESCRIPTION

OBJECTIVES AND SKILLS

METHODOLOGY

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	30.67 %	23 hours
Discussions	14.67 %	11 hours
Exercises	13.33 %	10 hours
Group work	26.67 %	20 hours
Other individual studying	14.67 %	11 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)
Introduction to Social Entrepreneurship: Definitions and Examples
Required readings:

Article: "The Meaning of Social Entrepreneurship" by J. Gregory Dees (The Fuqua School of Business., May 30, 2001) (ced)

Article: Social Entrepreneurship: The Case for Definition, By Roger L. Martin & Sally Osberg Spring 2007 (Stanford Social Innovation Review Spring 2007) (CED)

Article: Yunus, M. 2009. "Creating a world without poverty: Social business and the future of capitalism": Public Affairs, Global Urban Development Volume 4 Issue 2 (GLOBAL URBAN

DEVELOPMENT Volume 4 Issue 2 November 2008) (ced)
  - Pls come prepared to discuss your definition of social entrepreneurship and bring an example
    of a social enterprise you find interesting.

SESSIONS 3 - 4 (LIVE IN-PERSON)
The Fortune at the Base of the Pyramid: Understanding and Addressing the Needs of the World's Poorest
Required readings:
Book Chapters: Prahalad, C.K., 2006. The Fortune at the Bottom of the Pyramid, Eradicating Poverty through Profits. New Jersey: Wharton School Publishing. (Chapter 1) (CED)
Article: Is the Bottom of the Pyramid Really for You?, Ashish Karamchandani, Mike Kubzansky, Nishant Lalwani (HBS R1103J-PDF-ENG)
Practical Case: RHCF: Reaching Primary Healthcare to the BoP in rural India (HBS IMB435-PDF-ENG)

SESSIONS 5 - 6 (LIVE IN-PERSON)
Harnessing the Power of Microfinance to Serve the Poor
Required readings:
Article: Making Microfinance More Effective, Dean Karlan, Jake Kendall, Jonathan Zinman, Rebecca Mann, Rohini Pande, Tavneet Suri (HBS H035AV-PDF-ENG)
Article: Under Fire, Microfinance Faces Falling Out of Favor, Vijay Govindarajan (HBS H007JK-PDF-ENG)
Practical Case: Emerging Hope Lanka: Empowering Rural Women in Sri Lanka (HBS SMU821-PDF-ENG)

SESSION 7 (LIVE IN-PERSON)
Guest speaker(s)

SESSION 8 (ASYNCHRONOUS)
Frugal Innovation: Building a Successful Social Enterprise with Limited Resources
Readings for sessions 8&9
Required readings:
Article: What Frugal Innovators Do, Navi Radjou and Jaideep Prabhu, Dec. 10, 2014 (HBS H01R3K-PDF-ENG)
Article: Beyond Great Ideas: A Framework for Scaling Local Innovations, Dilip Soman, Vandana Kumar, Murray Metcalfe, Joseph Wong (HBS ROT180-PDF-ENG)

SESSION 9 (LIVE IN-PERSON)
Frugal Innovation: Building a Successful Social Enterprise with Limited Resources, Part 2
Readings for sessions 8&9
Required readings:
?   What Frugal Innovators Do, Navi Radjou and Jaideep Prabhu, Dec. 10, 2014

? Beyond Great Ideas: A Framework for Scaling Local Innovations, Dilip Soman, Vandana Kumar, Murray Metcalfe, Joseph Wong

Practical Case: Jayaashree Industries: Revolutionizing Sanitary Pad Use in India (HBS SMU109-PDF-ENG)

SESSION 10 (ASYNCHRONOUS)
Achieving Scaling and Financial Sustainability
Required readings:

Working Paper: Making Hybrids Work: Aligning Business Models and Organizational Design for Social Enterprises (HBS CMR593-PDF-ENG)
Article: Should Nonprofits Seek Profits?,William Foster, Jeffrey Bradach (HBS R0502E-PDF-ENG)
Practical Case: The Spinach King: Scaling Opportunity in Social Enterprise, South Africa (HBS W19662-PDF-ENG)
Practical Case: BRAC in 2014, Bangladesh (HBS 715414-PDF-ENG)

SESSION 11 (LIVE IN-PERSON)
Achieving Scaling and Financial Sustainability
Required readings:
Same readings as for session 10:
Working Paper : Making Hybrids Work: Aligning Business Models and Organizational Design for Social Enterprises
Article : Should Nonprofits Seek Profits?,William Foster, Jeffrey Bradach
Practical Case : The Spinach King: Scaling Opportunity in Social Enterprise, South Africa
Practical Case : BRAC in 2014, Bangladesh

SESSIONS 12 - 13 (LIVE IN-PERSON)
Financing Social Enterprises and Measuring Impact
Required readings:

Article: A New Approach to Funding Social Enterprises, Antony Bugg-Levine, Bruce Kogut, Nalin Kulatilaka (HBS R1201K-PDF-ENG)
Article: Social Impact Investing Will Be the New Venture Capital (HBS H009ZJ-PDF-ENG)
Practical Case: Acumen Fund: Measurement in Impact Investing (A), Alnoor Ebrahim, V. Kasturi Rangan (HBS 310011-PDF-ENG)

SESSION 14 (LIVE IN-PERSON)
Final Presentations

SESSION 15 (LIVE IN-PERSON)
Final exam/report

EVALUATION CRITERIA

EVALUATION CRITERIA

The breakdown of the final grade is as follows.

Participation: 10%
Group Presentations: 40%
Final Report: 50%

Class Participation (10%):

Criteria used to measure participation:

- Depth and quality of the contribution (whether your comments are relevant and interesting).

- Frequency of your contributions, whether you actively participate in every class and not just a few.

- whether you participate in group presentations and during the Q&A

- whether you volunteer to lead a case study discussion

- you can also participate via email by sending me comments or relevant articles/video links that add to the class discussion.

- Note that if you miss class, regardless of the cause of your absence, you automatically miss the opportunity to contribute to the class discussion and your grade could be affected.

Group Presentations (40%):

- Groups will do 2 presentations throughout the term (each worth 20%)

- Please submit your slides to the professor the day of the presentation

- Instructions will be posted and distributed in class.

Final exam/report (50%):
Detailed instructions will be distributed.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

providing faculty sources;
copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
copy-pasting material from external sources even while citing them;
using verbatim translations from sources in other languages without citing them;
copy-pasting material from external sources without citing them;
and buying or commissioning essays from other parties.
IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. The professor will advise the student on how to present said material. All written assignments have to be submitted through Turnitin, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIE Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIE Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel.

Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

6.3 CODE OF CONDUCT IN CLASS

1. Be on time: Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor).

2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor). If connecting remotely, leave video feed on at all times.

4. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. IF you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

5. Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

6. No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

7. Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

6.4 Technology: Cell-phones will not be allowed in synchronous class. Faculty should formally ask students to put them away at the beginning of any synchronous session. Hybrid participants must maintain their video feeds on.

Criteria	Percentage	Comments
Final Report	50 %	
Class Participation	10 %	
Group Presentations	40 %	

PROFESSOR BIO

Professor: **WAYA QUIVIGER**

E-mail: wquiviger@faculty.ie.edu

WAYA QUIVIGER

Waya Quiviger first joined IE Business School as Managing Director of the International MBA program. From 2009 to 2018, she was the Executive Director of the Master in International Relations. She is currently a Professor of Practice and the Executive Director of the Transatlantic Relations Initiative at IE School of Global and Public Affairs. Waya was also the lead coordinator of the annual Transatlantic Conference in collaboration with the Belfer Center at the Harvard Kennedy School and the Fundación Rafael del Pino. Waya Quiviger holds an M.Sc. in Politics of the World Economy from the London School of Economics (LSE), a Master in International Management from the Ecole Des Hautes Etudes Commerciales (HEC) and a Bachelor of Commerce from McGill University (CA).

Prior to joining IE, Waya worked for the World Economic Forum in Geneva, Switzerland as Manager of the Global Leaders for Tomorrow (GLTs), a community of outstanding young leaders, many of them social entrepreneurs. She has also consulted for the Women's Forum and the Club de Madrid. Ms. Quiviger teaches Global Governance & International Organizations and Aid, Development and Social Entrepreneurship in various undergraduate and graduate programs, as well as a Partnership and Multi-Stakeholder Engagement course in the Master in International Development. She also teaches social entrepreneurship and social innovation in the Master in Management and Global Executive MBA. She is the recipient of several awards for outstanding teaching. Her research interests include social innovation, social entrepreneurship, design thinking, global governance, intergovernmental institutions and international relations. Waya is a member of the Spanish Leadership Network of the Fundación Rafael del Pino.

OTHER INFORMATION

SUSTAINABLE INNOVATION TO EMPOWER IMPACTFUL MANAGEMENT AND BUSINESS

IE University
Professor: **CONCEPCIÓN GALDÓN SANZ-PASTOR**

E-mail: cgaldon@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
There are no prerequisites

SUBJECT DESCRIPTION
Students will be exposed to sustainable innovation driven by exponential technologies. In any sector or career path, the potential impact of innovation and technology to revolutionize your ability to advance the fight against prevalent issues such as poverty, lack of access to health and education or climate change is invaluable. By exposing students to examples of innovation in the most constrained circumstances, the course seeks to dispel the persistent myth that innovation is always resource intensive and limited to but a few heroic figures covered in popular press. Although most people might consider NGOs or International Organizations as the natural space for those interested in impact driven careers, there is actually a broad diversity of opportunities fitting for all profiles.

OBJECTIVES AND SKILLS
- Develop a sustainability mindset, integrating the social, environmental and economic components
- Understand the opportunities that the combination of technological innovation and sustainability will create in the next few years.
- Learn how to apply cutting edge technology to sustainable business models in various industries
- Understand the upside and also the potential risks of technology from a sustainability perspective (environmental, social and economic)

METHODOLOGY

The course will combine in class discussions, with workshops, group work and social entrepreneurs as guest speakers. Students will have an active participation presenting materials for class discussion/debate in most sessions. Using the tools they will learn in the course, each group will generate a technology-based innovation proposal for a social project and present their work to the class.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	20.0 %	15 hours
Discussions	26.67 %	20 hours
Exercises	13.33 %	10 hours
Group work	33.33 %	25 hours
Other individual studying	6.67 %	5 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)
Sustainable Innovation as a career path

Most people might consider NGOs or International Organizations as the natural space for those interested in sustainability- driven careers. However, there is actually a broad diversity of business-related opportunities for those who wish to become international decision makers with the skills to rethink strategy, leveraging innovation to navigate the complexities of sustainable business management from an Environmental, Social and Governance (ESG perspective). Environmental and social concerns are ever more prevalent in all sectors and funtional areas of companies. ESG (environment, society and governance) has become a critical lever to attract investors, impact finance has become a thriving sector and social impact consulting firms are growing exponentially. In this session we will discuss opportunities for students in the course.

Article: Big Four accounting firms rush to join the ESG bandwagon (Financial Times) (Financial Times, AUGUST 30 2021)

SESSION 2 (LIVE IN-PERSON)
Poverties: What is poverty, wealth, inequality or well-being

The definition of poverty has been evolving, from a strict income per day towards more complete definitions that seek to capture the difficulty or impossibility of individuals and families to achieve basic levels of well-being and satisfaction of needs. Similarly, the concept of inequality, its measurement and the way it materializes in the daily experience of different people in different countries conditions many of the forces that drag companies to take an active role in its reduction. In this session we will discuss these concepts, ways to capture them, and their relationship to business and the natural environment.

Article: Don't forget the 95% – why Europe needs to seize opportunities of labour migration (Euractiv, 26 feb 2021)

SESSION 3 (LIVE IN-PERSON)
Social Innovation in the Internet Era: Mobile first, IoT and Big Data

The widespread access to the Internet, the digitalization of the economy and the proliferation of mobile-based solutions (apps) already revolutionized many sectors in the last decade. Nowadays, this revolution is reaching far beyond most people's expectations. Mobile first has become a mantra not only for those wanting to sell luxury services to millennials in Europe, but also for organizations trying to support underserved populations in remote regions. In this session, we will discuss the immense potential for social innovation of the combination of accessible mobile technologies with Internet of Things and Big Data.

Preparation for class: Find use cases of these technologies applied to social/environmental impact.

SESSION 4 (LIVE IN-PERSON)

VR/AR based Social Innovations/ 3D Printing

Being able to physically reach classrooms or mentally conceptualize abstract concepts were big barriers limiting equal access to learning in the past. Not anymore. Nowadays, Virtual Reality and Augmented Reality allow us to convey learning and cultural experiences in more powerful and accessible ways. In this session, we will discuss the different applications and challenges of VR and AR technologies and specific use cases in the Education and Culture sectors.

In addition, we will discuss in this session the wealth of opportunities in various sectors brought about by additive building methods (3D Printing)

Preparation for class: Find use cases of these technologies applied to social/environmental impact.

SESSION 5 (LIVE IN-PERSON)

Social impact of tech: closing the digital divide

The unprecedented technological progress we are experiencing is an invaluable tool to confront prevalent issues such as poverty, lack of access to health or education. However, it also generates new challenges for sustainability at a social level. In this session, we will discuss critical challenges being debated today such as the exacerbation of inequality through the digital divide or the potential loss of jobs to accelerated technological advances.

Preparation for class: Watch assigned video and read short article and consider the following questions:

- What are the main problems the digital divide creates for society and the environment?
- What are the main problems the digital divide creates for business?
- What are the main barriers/challenges to closing the digital divide?

Video: Astro Teller: Technology with a Purpose #GOALKEEPERS17 (Youtube)

Article: The Digital Divide and the Perfect Inequality Storm (COBS Insights, May 14, 2020)

SESSION 6 (LIVE IN-PERSON)

Frugal Innovation

Social Innovation initiatives are typically implemented in contexts with limited resources available and with the aim to reach big volumes of people. Frugal innovation is a framework that aims at reducing complexity of the projects in order to limit their cost and boost their volume.

Practical Case: Beyond Great Ideas: A Framework for Scaling Local Innovations (HBS ROT180-PDF-ENG)

Preparation for class:

- Read article assigned (5 pages)
- Find examples of frugal innovations in social/environmental impact.

SESSION 7 (LIVE IN-PERSON)

Human Centered Design (HCD): Design Thinking

Design Thinking, the most renowned HCD methodology, developed in Sillicon Valley, California, has been adapted to service design, as well as product design and has been implemented in corporations, hospitals, governments and social organizations. Through empathy (listen, observe, and understand), multiple iterations and constant improvement, the services are increasingly molded to social reality. This session will provide a general overview of the Design Thinking Methodology.

Technical note: Why Design Thinking Works (HBS R1805D-PDF-ENG)

SESSION 8 (LIVE IN-PERSON)

Environmental impact of tech: the need for green technology

Technology is a poweful source of solutions to protect the environment and, at the same time, it also poses new challenges for it. In this session, we will discuss critical challenges being debated today such as the carbon footprint of digital technologies and the need for green software.

Preparation for class: Read assigned reading and find existing projects using technology to protect the environment or aimed at reducing the carbon footprint of technology use. As well as digital technologies, consider other technologies such as biotech, new material development, products designed for circularity,...

Technical note: How Green Is Your Software? (HBS H05V47-PDF-ENG)

Other / Complementary Documentation: Business Schools for Climate Leadership (BS4CL)

SESSION 9 (ASYNCHRONOUS)

Blockchain for Sustainability

In 2009 Blockchain was born, a technology that has already changed the world. In this dicussion forum, we will understand Blockchain's applications to social entrepreneurship in the context of a case about a fair traid coffee venture. We will discuss specific examples of how social entrepreneurs worldwide are using this technology, an other 4.0. technologies to protect people and planet and create new opportunities for inclusion.

Technical note: Coda Coffee and bext360 Supply Chain: Machine Vision, AI, IoT, and Blockchain (HBS TB0539-PDF-ENG)

Preparation for class: Read the case assigned and consider the following questions, which we will discuss on the online forum

1. How does Bext360's SAS solution ensure transparency?
2. What are the key stregths and limitations of their system?
3. How can Coda sell the value of their partnership with Bext360 to their wholesale and retail customers? And to their suppliers?

SESSION 10 (LIVE IN-PERSON)

Circularity as the solution to achieve and sustain an environmentally conscious economy

Since all of us alive today can remember, we have been producing and consuming goods as if resources were endless, following a linear mindset. We produce items and dispose of them such that it is extremely difficult and expensive to ever use the material again in other forms. In doing so, we turn valuable resources into waste. The circular economy proposes new production and consumption patterns that are more respectful of the limited natural resources on earth. According to the Ellen Macarthur Foundation, a circular economy is based on the principles of designing out waste and pollution, keeping products and materials in use, and regenerating natural systems.

Preparation for class: Read the assigned readings and find an example of a circular economy project to share with the class.

Article: What is a circular economy? (Ellen MacArthur Foundation)

Article: Recycling and the circular economy: what's the difference? (Ellen MacArthur Foundation)

SESSION 11 (LIVE IN-PERSON)

Regeneration: Pioneering the frontier of business value for all.
Renowned economists and management scholars have defended for decades the role of business as a force for good. However, most companies committed to sustainability resign themselves to operating without generating harm. The regenerative approach pushes the frontier of sustainable business one step further to inspire companies to leave a world that is better than the one they found.

Article: What is regenerative capitalism and why is it important?, 2022, Chris Stokel-Walker, (World Economic Forum, Jan 24, 2022)

SESSION 12 (ASYNCHRONOUS)

Responsible consumer/business behaviors boosted by innovation and technology

In this session, we will discuss the technology-driven cultural/social changes that have led to this new scenario in which clients, companies and investors are displaying more sustainable behaviors. Building on the example of circularity, students will advance their understanding of how human core elements, which drive consumer behaviour and our ability to actually engage with technology, continues to be critical, in conjunction with technology development.

Article: Who Cares About Organizational Purpose and Corporate Social Responsibility, and How Can Organizations Adapt? A Hypermodern Perspective (HBS BH1064-PDF-ENG)

Technical note: The future of sustainable fashion (Mckinsey & Company, December 14, 2020) (CED)

Reflect on the following questions, which we will discuss on the online forum:

1. Do you personally relate to the description of the hypermodern individual?
2. Considering that only a subset of the population actually cares about organization purpose, does it make sense to invest in developing sustainable technologies?
3. How might the % of consumers who care for the sustainability of their products evolve in the future?
4. Can you find other articles/sources about future trends of consumer behaviors driven by technology?

SESSION 13 (LIVE IN-PERSON)
Sustainable Leadership

Business leaders are facing a reality in which the complexity of the contexts in which they operate is increasing and the quality of the information on which they have to make decisions is not always adequate due to the speed and nature of the changes. Making decisions that consider the sustainability of the company from a systemic point of view is not easy and requires well-trained leaders, willing to take on challenges and determined to work with all relevant actors in contexts of high uncertainty. In this session we will discuss the critical principles to keep in mind when leading a sustainable organization.

Article: Innovating for Shared Value (HBS R1309H-PDF-ENG)

SESSION 14 (LIVE IN-PERSON)

Funding Social Innovation: Sustainable Finance

The role of finance in our world is absolutely critical. If we want the right things to happen, we need the right kind of funding. Awareness about the impact of economic choices has increased among consumers and investors, who now factor social and environmental considerations into their daily decision-making. Consequently, a whole sector has developed within the financial industry that cares for social and environmental impact and seeks returns beyond financial. Sustainable finance poses immense opportunities for social innovators seeking to grow their projects. Some concepts we will discuss are Impact Investment, ESG, Social Impact Bonds.

Preparation for class:

Find examples of sustinable finance.

SESSION 15 (LIVE IN-PERSON)

Final presentations of group projects

EVALUATION CRITERIA

Your final grade in the course will be based on both individual and group work of different characteristics that will be weighted in the following way:

Criteria	Percentage	Comments
Class Participation	25 %	
Individual Presentation	25 %	
Final Group Report	30 %	
Group Presentation	20 %	

CLASS PARTICIPATION

Three main criteria will be used in reaching judgment about your class participation:

- Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high quality comment reveals depth of insight, rigorous use of case evidence, consistency of argument, and realism.
- Moving Your Peers' Understanding Forward: Great ideas can be lost through poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments, and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.
- Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, it is the quality of your comments that must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

FINAL GROUP PRESENTATION/ REPORT:

Each student, individually, will write a report that presents an analysis of a matter (for example waste management in the fashion industry or difficulties of behavior change with respect to CO2 emissions) that combines social and environmental challenges that might be solved applying innovation and technology. The report will take a challenge, analyze it and propose a strategy or range of possible strategies, analyzing challenges and opportunities associated with them. To do this, students will be able to use secondary data sources and also interviews with experts involved in the topic they are writing about.

The reports should consist of a maximum of 8 pages + annexes and they will be evaluated according to the following criteria:

- Depth of analysis
- Use of data (comparison with other players, trends, interviews…)
- Strength of the argument
- Rigor in the presentation of conclusions, recommendations and alternatives

In addition to the report, you will deliver your presentation during session 15. You will have a total of 10 minutes for your presentation followed by Q&A

INDIVIDUAL ESSAY

Imagine you are a blogger specialized in sustainable innovation and you are writing the next post for your blog:

- Find a startup/project that is working in the intersection of Tech/innovation and
  Sustainability (aligned with the SDGs, so there are many options).
- Contact and interview them. Get as much insider information as posible. What do the interviews and information tell you?
- Write an essay describing the project, its impact and its novelty/innovation.
- You will be evaluated in the depth of your analysis, use of compelling arguments,
  presentation of the conclusions, novelty of the Company solutions.
- Your essay should be 2 pages + annex (add there links, data…) or less. It should be delivered by sesión 14, end of day.
- You can submit the report before if you want to, window will be from sesión 10 to 14.

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt should contact the professor during the first two weeks of the course.

ATTENDANCE

Attendance is **mandatory** at IE University, as it is an essential factor of IE´s learning methodology, a continuous process of learning through participation in class, other students' contributions and presentations, among others. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0,0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year. Having established the rule, we strongly discourage to use this buffer as granted, we highly recommend to attend 100% of the classes as it will improve your learning outcomes, it will increase the class performance and it might improve your participation grade.

Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other contexts involving force majeure, are to be consulted with the Program Management team for assessment of the situation and corresponding documentation, so that Program Management can support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

- The retakes will consist of a comprehensive exam. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.
- The exam will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.
- Dates and location of the retakes will be posted in advance and will not be changed.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. The professor will advise the student on how to present said material. All written assignments have to be submitted through Turnitin, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the Academic Ethics Committee. Very high similarity scores will be automatically flagged and forwarded to the Academic Ethics Committee. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **CONCEPCIÓN GALDÓN SANZ-PASTOR**

E-mail: cgaldon@faculty.ie.edu

CONCEPCIÓN GALDÓN SANZ-PASTOR

Concepción Galdón is IE University's Social Innovation Director/Academic Lead. At IE she has the mandate to promote Social Innovation academic content across Schools and Programs, encourage more research in Social Innovation and reach out to organizations and partners interested in Social Innovation. Concepción is professor of Entrepreneurship and Innovation at IE. Concepción is also President of the social Venture Puentes Global, which she co-founded in 2009. She´s a member of Ashoka Spain's Venture Board and sits on several Impact Fund's Investment Committees/Advisory Boards.

Concepción is an Economist by Universidad Autónoma de Madrid. She holds a Master in Public Administration and International Development by Harvard Kennedy School. Concepción holds a PhD in International Economy and Development by Universidad Complutense de Madrid, who granted her and Outstanding Award for her Doctoral Dissertation. Her PhD research focuses on the use of technology in social entrepreneurship. She has published papers in peer reviewed journals and chapters in books. She writes contributions for mass media regularly and is a speaker at international conferences.

Her past professional experience includes the foundation of an NGO, UN's Procurement Service, Santander Bank's Latin America Division and Liberia's Government under Ellen Johnson-Sirleaf, Nobel Peace Prize 2011.

OTHER INFORMATION

THE AGE OF E-SPORTS: THE FUTURE IS NOW

IE University
Professor: **MIGUEL PANIAGUA**

E-mail: mapaniagua@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

Previous knowledge of the matter for the correct development of the learning process is not necessary.

SUBJECT DESCRIPTION

The IE University esports Elective Course focuses on the business of esports, the most popular sport amongst young people in the current times.

OBJECTIVES AND SKILLS

The student will learn the culture of esports, its audience and fan base as well as familiriaze himself with the different game genres that conform the microcosmos of this new industry. The student will acquire the necessary tools to learn how to create an esports club as well as develop and implement an esports event.

METHODOLOGY

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	30.67 %	23 hours
Discussions	13.33 %	10 hours
Exercises	16.0 %	12 hours
Group work	20.0 %	15 hours
Other individual studying	20.0 %	15 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

What are esports? Are esports the sport of the future?

SESSION 2 (LIVE IN-PERSON)

Why we play? Why we enjoy watching other people play? The genetics of the gaming culture.

SESSION 3 (LIVE IN-PERSON)

Competitive gaming culture: from the cybercafés to the big stadiums

SESSION 4 (ASYNCHRONOUS)

Which are the main esports: an overview of the main e-games

SESSION 5 (LIVE IN-PERSON)

The agents of esports I: The Publishers

SESSION 6 (LIVE IN-PERSON)

The agents of esports II: The Clubs

SESSION 7 (LIVE IN-PERSON)

The agents of esports III: The Sponsors

SESSION 8 (LIVE IN-PERSON)

The agents of esports IV: The Organizers. Event planning and strategy in esports

SESSION 9 (LIVE IN-PERSON)

The agents of esports V: The Players: who are they? How are they? Why are they shining stars?

SESSION 10 (LIVE IN-PERSON)

League of Legends: "LOL" is not only "laughing out loud"

SESSION 11 (LIVE IN-PERSON)

Counter Strike-Global Offensive: The best spectator e-game

SESSION 12 (LIVE IN-PERSON)

The streamers: Twitch; Amazon had a vision

SESSION 13 (ASYNCHRONOUS)

The Asia Case: Asia is the continent in which esports are as mainstream as traditional sports.

SESSION 14 (LIVE IN-PERSON)

The challenges of the esports industry: media, monetization, regulations.

SESSION 15 (LIVE IN-PERSON)

Group presentations and reports by the students

EVALUATION CRITERIA

Final grades in the course will be based on both individual and group work of different characteristics that will be weighted in the following way:

Criteria	Percentage	Comments
Class Participation	25 %	
Two group case write-ups	35 %	
Final group presentation & report	40 %	

PROFESSOR BIO

Professor Miguel A. Paniagua is one of the biggest Spanish experts on US sports. He has developed a very successful career both as a sports journalist and as a sports manager for the last three decades. He has a been key component in many recent Spanish sports radio shows, such as "Carrusel Deportivo", "El Larguero", or "Tiempo de Juego", where he is nicknamed "El profesor". His articles have appeared in prestigious Spanish and US publications, such as El País or Sports Illustrated.

- Office hours: In order to provide feedback and respond to any doubts Professor Miguel A. Paniagua will be available from xx.xx to xx:.xx on class day.
- Contact details: mapaniagua@faculty.ie.edu

Professor: **MIGUEL PANIAGUA**

E-mail: mapaniagua@faculty.ie.edu

MIGUEL PANIAGUA

OTHER INFORMATION

In this course, Professor Miguel A. Paniagua will be assisted by Dr. Marcos Anton, journalist and a highly respected expert in the investigative field of esports. Professor Paniagua will also be assisted by Mr. Fernando Cardenete, esports expert from Mediapro, a well known Spanish multimedia group. Mr. Cardenete is also a widely recognized figure in esports.

ADDITIONAL MATERIALS

The followings books and articles recommended for use in this course will be:

- Taylor, T. (2012). Raising the Stakes: E-Sports and the Professionalization of Computer Gaming. Cambridge, Estados Unidos: The MIT Press.
- Wagner, M. (2006). On the Scientific Relevance of eSports. En H. R. Arabnia, J. Arreymbi, V. A. Clincy, O. Droegehorn, J. Lu, A. M. G. Solo, J. A. Ware y S. Zabir (Eds.).
- Proceedings of the 2006 International Conference on Internet Computing & Conference on

Computer Games Development, ICOMP'06, (pp. 437-442). CSREA Press.

- Carrillo, J.A. (2016). De jugadores a espectadores. La construcción del espectáculo mediático en el contexto de los e-sports. En J. Sánchez-Navarro, A. Planells, V. Navarro y D. Aranda (Coords.), Juego digital II. Análisi. Quaderns de Comunicació i Cultura. 55, 1-16.
- Chanson, R. (2017). Esports. Todo lo que necesitas saber de League of Legends al FIFA. Barcelona, España: Planeta
- Seo, Y. (2013). Electronic Sports: A new marketing landscape of the experience economy. Journal of Marketing Management, 29(1), 1542-1560. doi:10.1080/0267257X.2013.822906
- Hutchins, B. (2008). Signs of meta-change in second modernity: the growth of e-sport and the World Cyber Games. New Media & Society, 10(6), 861-869. doi: 10.1177/1461444808096248
- Jonasson, K. y Thiborg, J. (2010). Electronic sport and its impact on future sport. Sport in Society, 13(2), 287-299. doi:10.1080/17430430903522996
- T.L. Taylor (2018) Watch me Play Twitch and the Rise of Game Live Streaming (Princeton Studies in Culture and Technology)
- Antón, M. y García, F. (2014). Deportes electrónicos. Una aproximación a las posibilidades comunicativas de un mercado emergente. Questiones Publicitarias, 1(19), 98-115.

TRANSITIONAL JUSTICE

IE University
Professor: **NIKOLINA ZIDEK**

E-mail: nzidek@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
No prerequisites required except for interest in contemporary history and conflict zones.

SUBJECT DESCRIPTION
Transitional justice is "a response to systematic or widespread violations of human rights. It seeks recognition for victims and promotion of possibilities for peace, reconciliation and democracy. Transitional justice is justice adapted to societies transforming themselves after a period of pervasive human rights abuse" (ICTJ). These efforts include mutually related core elements such as criminal prosecutions, reparations, truth commissions, gender justice, memorialization efforts and security sector/institutional reform. The list is not definite, since every society invests its own efforts and there is no recipe for a successful transitional justice, but each society should choose its own path.

This course aims to offer an overview of the evolution of transitional justice as a discipline and its mechanisms in practice by studying cases from different latitudes. After an introduction, definitions, historical background, general considerations and main issues, the course will focus on the core elements applied to case studies: criminal prosecution- international (ad hoc – ICTY and ICTR and permanent- ICC) and national; "indigenous", "traditional" or "informal" justice mechanisms; truth-seeking initiatives: truth commissions; memory and memorializations, reparations, lustrations; justice and police sector reform; demobilization, rehabilitation and reintegration (DRR); rewriting history: educational and cultural institutions. Geographically, cases will be studied from the countries such as Former Yugoslavia, Rwanda, South Africa, Cambodia, Nepal, Argentina, Chile, Brazil, Spain, Colombia and Tunisia. The last session will be a debate on results and reconciliation as the final goal of transitional justice.

OBJECTIVES AND SKILLS
1. To become familiar with the most recent discussions and authors in the fields of transitional justice, drawing on interdisciplinary studies.
2. To get acquainted with the main mechanisms of transitional justice and their implications.
3. To provide students with the necessary background in order be able to identify the central issues in a given geographical context.
4. o develop the capacity of drawing conclusions from given case studies and offer possible

solutions for the current and future post-conflict societies.

METHODOLOGY

The course will be conducted in a seminar/ lecture format; it will include lectures and seminar discussions both on scholarly readings and on students' work.

The students will present case studies assigned to them in the previous class or will be engaged in in-class simulations.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	26.67 %	20 hours
Discussions	26.67 %	20 hours
Exercises	13.33 %	10 hours
Group work	0.0 %	0 hours
Other individual studying	33.33 %	25 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

In the first session, we glve an overview of the course structure and discuss the in-class presentation topics/case studies that will be distributed by the next session. Then, we shall introduce the concept of transitional justice, its main issues, debates, and mechanisms.

In the second session, we will give an overview of the historical development of transitional justice mechanisms from the earliest isolated cases to the modern transitional justice until today.

Book Chapters: Chapter 1: Olivera Simic, (Ed.): An Introduction to Transitional Justice (See Bibliography)

Article: Samuel P. Huntington: How countries democratize. (Political Science Quarterly Volume 124 Number 1 2009) (ced)

Technical note & tutorials: Transitional Justice (FTR020007-U-ENG-VID)

Book Chapters: Chapter 2 in Olivera Simic (Ed.), Andrew G. Ritter: An Introduction to Transitional Justice (See Bibliography)

Article: Ruti Teitel: Transitional Justice Genealogy. (Harvard Human Rights Journal / Vol. 16) (ced)

SESSION 3 (LIVE IN-PERSON)

RETRIBUTIVE TRANSITIONAL JUSTICE - INTERNATIONAL TRIALS

In this session, we will give an overview of the main events in the development of international criminal justice until today. We will also delve into the complexity of the feasibility of international criminal justice and the International Criminal Court (ICC) situation. Finally, we shall study the issue of competencies and complementarity of national courts and ICC and the interaction between international politics and justice. The session will also pinpoint some seminal cases from international criminal tribunals.

After an introduction and the lecture by the professor, and based on the readings for Session 3 and the uploaded video, we will have a discussion the following questions:

1) Can there be peace without justice?
2) How would you evaluate the development of international criminal justice since 1990s?

Book Chapters: Chapter 3 in Olivera Simic, (Ed.), Rachel Kerr: An Introduction to Transitional Justice (See Bibliography)

Working Paper: Paul Seils: Handbook on Complementarity: An Introduction to the Role of National Courts and the ICC in Prosecuting International Crimes (ICTJ)

Video: Global Justice & Human Rights Trials (PBS)

SESSION 4 (LIVE IN-PERSON)

RETRIBUTIVE TRANSITIONAL JUSTICE: INTERNATIONAL AND DOMESTIC TRIALS (CASE STUDIES)

After the explanatory Session 3 on criminal justice, in this session, the previously selected students will carry out presentations of case studies on ad hoc international criminal tribunals, hybrid courts, and International Criminal Court, as well as success and failure stories of domestic trials (Argentina and Croatia).

Depending on the topic they choose, the students will receive specific instructions and materials for their case presentations by the professor. There will be two presentations on international criminal justice (15 minutes each) and two presentations on domestic trials (15 minutes each). Finally, there will be 20 minutes of live discussion with students on the presented cases and the TJ mechanism in general.

Case studies presentations and discussion:

International Criminal justice: *Ad hoc* international criminal tribunals, hybrid courts, and International Criminal Court

Domestic trials: Argentina, Croatia

SESSION 5 (LIVE IN-PERSON)

"INDIGENOUS", "TRADITIONAL" OR "INFORMAL" JUSTICE MECHANISMS

After an introduction by the professor, the previously selected students will carry out presentations of case studies (15 minutes each) on informal justice examples. Finally, there will be 20 minutes live discussion with students on the presented cases and the TJ mechanism in general. Depending on the topic they choose, the students will receive specific instructions and materials for their case presentations by the professor.

Case studies:

Rwanda (gaçaca), Northern Uganda (Mato Oput), Bosnia and Herzegovina (Women's Court), Argentina (Trials for Truth)

Book Chapters: Chapter 8, in Olivera Simic, (ed.), Lars Waldorf: An Introduction to Transitional Justice (See Bibliography)

SESSION 6 (LIVE IN-PERSON)

TRUTH COMMISSIONS

After an introduction by the professor, the previously selected students will carry out presentations of case studies (15 minutes each) on truth commissions examples. Finally, there will be 20 minutes live discussion with students on the presented cases and the TJ mechanism in general. Depending on the topic they choose, the students will receive specific instructions and materials for their case presentations by the professor.

Case studies:

Truth Commissions: South Africa, Guatemala, US, or any other relevant truth commission.

Book Chapters: Chapter 5. An Introduction to Transitional Justice (See Bibliography)

Article: Democratizing Truth: An Analysis of Truth Commissions in the United States (International Journal of Transitional Justice, 2021, 15, 510–532) (ced)

SESSION 7 (LIVE IN-PERSON)
AMNESTIES

This session will introduce the debate of "peace vs. justice" by analyzing the issue of amnesties, their context, and the main elements - it will finally present different types of amnesties. The previously selected students will carry out presentations of case studies on amnesty laws and reparations (15 minutes each). Depending on the topic they choose, the students will receive specific instructions and materials for their case presentations by the professor in due time. Finally, there will be 20 minutes live discussion with students on the presented cases and the uploaded lecture by Kevin Heller.

Case studies: Spain, Chile, Afghanistan and/or Uruguay

Book Chapters: Chapter 6, in Olivera Simic (ed.); Agata Fijalkowski: An Introduction to Transitional Justice (See Bibliography)

Article: Rethinking amnesties: atrocity, accountability and impunity in post-conflict societies
(Contemporary Social Science Vol. 6, No. 1, 107–128, February 2011) (ced)

Video: Transitional justice and the role of amnesties (Youtube)

SESSION 8 (LIVE IN-PERSON)
REPARATIONS

This session will present the issue of reparations and the implications of reparation laws and the main debates and issues surrounding the reparations in practice. After an introduction by the professor, the previously selected students will carry out presentations of case studies on reparations (15 minutes each). Depending on the topic they choose, the students will receive specific instructions and materials for their case presentations by the professor in due time. Finally, there will be 20 minutes live discussion with students on the presented cases and the TJ mechanism in general.

Case studies: Japanese American Internment; German reparations to the Jews after WWII, Belgian apology to Congo, French apology to Algeria

Book Chapters: Chapter 9. An Introduction to Transitional Justice. (See Bibliography)

Book Chapters: Introduction. The Handbook of Reparations (IE Library)

SESSION 9 (LIVE IN-PERSON)
CAN WE TEACH OLD DOGS NEW TRICKS? LUSTRATION AND VETTING

This session will treat the issue of what should we do with the old structures and institutions. One of the possible measures is lustration and vetting - especially of the parliaments and other state institutions. We will then discuss the issue of the need for urgent measures, on the one hand, the time factor on the other (some reforms take time), and how to find a balance between the two.

After an introduction by the professor, the previously selected students will carry out presentations of case studies on lustration and vetting in Eastern Europe and Iraq (15 minutes each). Depending on the topic and case, the students will receive specific instructions and materials for their case presentations by the professor in due time. Finally, there will be 20 minutes live discussion with students on the presented cases and the TJ mechanism in general.

Case studies: Lustration and vetting in Central and Eastern European countries, de-Baathification in Iraq

Book Chapters: Chapter 7, in Olivera Simic (ed.); Lavinia Stan: An Introduction to Transitional

Justice (See Bibliography)

SESSION 10 (LIVE IN-PERSON)
CAN WE TEACH OLD DOGS NEW TRICKS? JUSTICE AND POLICE SECTOR REFORM

This session will treat the issue of what should we do with the old structures and institutions. One of the possible measures is the justice and police sector reform. We will then discuss the issue of the need for urgent measures, on the one hand, the time factor on the other (some reforms take time), and how to find a balance between the two.

After an introduction by the professor, the previously selected students will carry out presentations of case studies on justice and police sector reform - of their choice from the list (15 minutes each). Depending on the topic and case, the students will receive specific instructions and materials for their case presentations by the professor in due time. Finally, there will be 20 minutes live discussion with students on the presented cases and the TJ mechanism in general.

Case studies: Police and/or justice sector reform in Chad, Eastern Zaire, Kosovo or Spain (or any other country of interest)

Practical Case: Police Reform in Situations of Forced Displacement (ICTJ, July 2012)

Working Paper: Addressing Corruption Through Justice-Sensitive Security Sector Reform (ICTJ)

SESSION 11 (LIVE IN-PERSON)
DEMOBILIZATION, REHABILITATION AND REINTEGRATION (DRR)

Case studies: Colombia (combatants), Child soldiers (Sierra Leone), reintegration of women victims of wartime sexual violence (DRC).

After an introduction by the professor of the main elements and implications of Demobilization, Rehabilitation and Reintegration (DRR), the previously selected students will carry out presentations of three case studies of different types of DRR: the former guerrilla combatants in Colombia, the child soldiers in Sierra Leone and the reintegration of women victims of wartime sexual violence in DRC or Yazidis in Iraq (15 minutes each). Depending on the topic they choose, the students will receive specific instructions and materials for their case presentations by the professor in due time. Finally, there will be a 20 minutes live discussion with students on the presented cases and the TJ mechanism in general.

Book Chapters: Lars Waldorf: Introduction, in Patel, A. C.; De Greiff, P.; Waldorf, L. Disarming the Past : Transitional Justice and Ex-Combatants; Social Science Research Council: New York, 2010. (ced)

Working Paper: Transitional Justice and DRR: the case of Colombia. International Center for Transitional Justice (ICTJ, June, 2009)

Article: Zeynep Kaya: Iraq's Yazidis and ISIS: The Causes and Consequences of Sexual Violence in Conflict (LSE Middle East Centre Report | November 2019) (ced)

Working Paper: Heykoop, Cheryl, and Phillip Cook Child Participation In The Sierra Leone Truth & Reconciliation Commission: Considering The Broader Cultural Context (UNICEF Innocenti Research Centre)

SESSION 12 (LIVE IN-PERSON)
MEMORIALS AND MEMORIALIZATION

In this session, we will present the main debates regarding the memory of the past violence through memorialization projects (monuments, museums, commemorations).

After an introduction by the professors, the previously selected students in this session will carry out presentations of case studies of memory and memorialization - (15 minutes each). Depending on the topic and case, the students will receive specific instructions and materials for their case presentations by the professor in due time. Finally, there will be 20 minutes of live discussion with students on the cases from the syllabus, the cases presented in class, and the TJ mechanism in general.

Case studies:

The Valley of the Fallen (Spain), Anniversary of the Liberation from Auschwitz, toppling of Confederate and Columbus monuments in the US

Book Chapters: Chapter 12: MEMORY AND MEMORIALIZATIONS, in Olivera Simic (ed.); An Introduction to Transitional Justice (See Bibliography)

Article: Site of memory and dismemory: the Valley of the Fallen in Spain. Journal of Genocide Research (Journal of Genocide Research, 2014 Vol. 16, No. 4, 463–48) (ced)

Multimedia Documentation: Additional case study material: Yasukuni Shrine: Controversy, history and peace (CGTN August 2020)

Video: Additional case study material: South Korea's 'comfort women' statues featuring PM Abe 'lookalike' spark anger in Japan (Youtube)

SESSION 13 (LIVE IN-PERSON)
EDUCATION AND HISTORY

In this session, we will present the main debates regarding the memory of the past violence and what kind of history will be taught to future generations.

After an introduction by the professor, in this session, the previously selected students will carry out presentations of case studies on Education and History teaching - of their choice from the list - the 1947 British India Partition, Armenia, Ghana, the European colonization of the Americas or any other (15 minutes each). Depending on the topic and case, the students will receive specific instructions and materials for their case presentations by the professor in due time. Finally, there will be 20 minutes of live discussion with students on the presented cases and the TJ mechanism in general.

Case studies:

Education and history teaching: the 1947 British India Partition, Armenia, Kenya, Ghana, the European colonization of the Americas, history education on WW2 in the country of your choice, how do we measure Holocaust education?

Book Chapters: History Education in the Midst of Post-conflict Recovery: Lessons Learned, in History Can Bite : History Education in Divided and Postwar Societies; Eckert. Schriftenreihe, Band 141; V & R unipress: Go¨ttingen, 2016.

Article: Grandpa Wasn't a Nazi: The Holocaust in German Family Remembrance (INTERNATIONAL PERSPECTIVES 54, American Jewish Committee, 2005)

Video: 'Learning History that is not yet History' (Youtube)

SESSION 14 (LIVE IN-PERSON)
TRANSITIONAL JUSTICE IN BALANCE; RECONCILIATION AS THE FINAL GOAL OF TRANSITIONAL JUSTICE

In this session we will review the whole course and stress the main takeaways through a live discussion with students.

Book Chapters: Chapter 13, in Olivera Simic (ed.), Andrew G. Reiter: An Introduction to Transitional Justice (See Bibliography)

Working Paper: Roger Duthie: JUSTICE MOSAICS How Context Shapes Transitional Justice in Fractured Societies - Research Report. International Center for Transitional Justice (ICTJ, 2017)
Book Chapters: Transitional Justice and Reconciliation: Theory and Practice, in B. Austin, M. Fischer, H.J. Giessmann (eds.) 2011. Advancing Conflict Transformation. The Berghof Handbook II. Opladen/Framington Hills: Barbara Budrich Publishers. (ced)
Article: Transitional justice in the world, 1970-2007: Insights from a new dataset (Journal of Peace Research, 47 (6) 803 - 809) (ced)

SESSION 15 (LIVE IN-PERSON)

FINAL EXAM

Essay type questions: 1 obligatory, and 1 optional - out of 3 offered.

BIBLIOGRAPHY

Compulsory

- Olivera Simic. (2020). *An Introduction to Transitional Justice.* 2nd edition. Taylor and Francis. ISBN 9780367893668 (Printed)

Textbook

null

EVALUATION CRITERIA

Criteria	Percentage	Comments
Class Participation	10 %	
In-class presentation	20 %	
Final exam	40 %	
Final short paper	30 %	

A. CLASS PARTICIPATION

Three main criteria will be used in reaching a judgment about your class participation:

1. Depth and Quality of Contribution: The most important dimension of participation concerns what it is that you are saying. A high-quality comment reveals the depth of insight, rigorous use of case evidence, consistency of argument, and realism.
2. Moving Your Peers' Understanding Forward: Great ideas can be lost through the poor presentation. A high quality presentation of ideas must consider the relevance and timing of comments and the flow and content of the ensuing class discussion. It demands comments that are concise and clear, and that are conveyed with a spirit of involvement in the discussion at hand.
3. Frequency: Frequency refers to the attainment of a threshold quantity of contributions that is sufficient for making a reliable assessment of comment quality. The logic is simple: if contributions are too few, one cannot reliably assess the quality of your remarks. However, once threshold quantity has been achieved, simply increasing the number of times you talk does not automatically improve your evaluation. Beyond the threshold, the quality of your comments must improve. In particular, one must be especially careful that in claiming more than a fair share of "airtime", quality is not sacrificed for quantity. Finally, your attempts at

participation should not be such that the instructor has to "go looking for you". You should be attempting to get into the debate on a regular basis.

B.   IN - CLASS ASSIGNMENTS

During the course, the students will prepare presentations on the topics given in the previous class. The presentations are going to be concise summaries, case studies, and presentations of one side or aspect of a transitional justice mechanism in question.

The objective of this process is to give you practice in presenting and understanding relevant issues in Transitional Justice. It also increases class participation and makes the class more dynamic.

C.   INDIVIDUAL WORK - SHORT PAPER

Each student will write one short paper (5 pages) related to topics of particular interest to you and related to the course syllabus, issues that aroused curiosity in you, or related discussions. Focus on current issues and originality will be highly valued. The project will give you the opportunity to reflect on what you have learned in class and apply it to some particular country or region. More details of the project will be provided at the start of the course. The topic should be discussed with and approved by the instructor before you begin work on it. It is a good idea to start thinking about potential paper topics early in the semester and come see me discuss your ideas. All papers will be graded using Turnitin.

D.   FINAL EXAM

The final exam in a form of an essay will be a summary of the main topics of the course and current issues. It will consist of one (1) obligatory question/topic (50% of the final exam grade) and one (1) out of three (3)elective questions/topics (bearing 50% of the final exam grade).

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade.

Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today ?s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goal 4, 5, 10 and 16 (inclusive and equitable quality education, gender equality and empowerment of all women and girls, reducing inequality within and among countries, and promoting peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels). Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

Attendance is mandatory at IE University, as it is an essential factor of IE ?slearning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence from the session. Extreme cases involving emergencies such as extended hospitalizations, accidents, serious illnesses, and other cases of force majeure, are to be consulted with the Program Management (bir.madridoffice@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, who are banned from this possibility).

Grading for retakes will be subject to the following rules:

- The retakes will consist of a comprehensive exam or equivalent assignment. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.

- Dates and location of the retakes will be posted in advance and will not be changed.

- The exam/assignment will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of the seriousness of the offense:

- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

PROFESSOR BIO

Professor: **NIKOLINA ZIDEK**

E-mail: nzidek@faculty.ie.edu

NIKOLINA ŽIDEK

Nikolina Židek is Adjunct Professor at IE School of Global and Public Affairs since 2016. She is also member of the Research Group "Lugares, marcas y territorios de memoria" (Places, marks and territories of memory) of the Memory Studies Nucleus, Institute for Economic and Social Development/Instituto de Desarrollo Económico y Social (IDES) in Buenos Aires.

She was an invited lecturer at the Advanced Study Course in Human Rights and Genocides, Universidad del Museo Social Argentino (UMSA) in cooperation with Luisa Haraibedian Foundation, Buenos Aires, Argentina (2017-2019). She was also a post-doctoral fellow at the Center for Southeast European Studies - University of Graz, Austria (2020) and at the Center of Advanced Studies of Southeastern Europe - University of Rijeka (2021 and 2022).

Dr. Židek holds a PhD in political science from the Complutense University in Madrid and a Masters degree in International Studies from the Diplomatic School of Madrid in cooperation with the Complutense University. She wrote her PhD thesis on Transitional justice and EU enlargement to Croatia and Serbia. Before entering the academia Dr. Židek was previously working for 12 years as Croatian professional diplomat. She was posted in Croatian Embassies in Madrid and Buenos Aires.

Her areas of expertise are transitional justice and human rights, memory politics, the Balkans, diaspora politics, and democratization processes.

OTHER INFORMATION

Office hours: to be communicated according to the course schedule (an hour before or after class or by appointment face to face or through Skype or Zoom)

Contact details:

email: nzidek@faculty.ie.edu

UNDERSTANDING INTERNATIONAL PUBLIC FINANCE: IFI POLICIES FOR GROWTH AND FINANCIAL STABILITY

IE University
Professor: **GREGORIO BUSTOS SERRANO**

E-mail: gbustos@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES

Basic knowledge on microeconomics, macroeconomics and international finance.

SUBJECT DESCRIPTION

The field of international public finance is a fascinating subject for economists, business people and policy makers that want to understand how governments and international finance institutions understand and manage public finance.

Public finance is the study of the role of the government in the economy. It is the branch of economics that manages government revenue and government expenditure of the public authorities, and the adjustment of one or the other to achieve desirable effects and avoid undesirable ones.

In this course students will acquire a general knowledge of the three main function of public finance:

- Management of income and expenditure by optimum utilization of the resources
- Managing economic growth and price stability in the economy
- Providing the necessary needs and infrastructure to the public

Corporations, countries and citizens base their daily decisions on the development and expectations of effective public financing.

Students will study the role of the International Financial Institutions (IMF, World Bank, etc.) in advising and supporting governments on public policies to achieve sustainable economic growth and financial stability.

OBJECTIVES AND SKILLS

1. Knowledge of the main concepts on public finance

2. Identification and handle of key sources of information to secure a critical interpretation of topics related to public finance

3. Develop the capacity to analyze context, processes, or situations to make use of the skills on public finance

4. Apply critical thinking in developing arguments on debates about international comparative public finance that allow for making sound business decisions

5. Strengthen personal skills: communication, teamwork, time management, and methodological rigor

METHODOLOGY

The subject will be taught in lectures (theory and concepts) together with practical activities (business cases) covering real issues.

The mandatory text-book …

Most sessions will start with a lecture of the professor on the indicated subject. Students are asked to participate to clarify specific issues or general doubts. After the lecture and Q&A, the assigned articles and cases will be discussed in class. It is mandatory to read the assigned materials and prepare the cases.

There will be an individual paper on a topic related to the subject. This assignment will have between 8-10 pages. Topics will be agreed with the professor. This assignment is due before the final examination.

A group assignment is also part of the class. This assignment must be presented and exposed to the class in the last sessions of the course. Topics and preparations will be agreed with the professor.

Participation in class, discussions, exercises and team work will help to strengthen the learning process.

Individual studying and self-initiative are key for examinations and satisfactory learning.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	0.0 %	0 hours
Discussions	0.0 %	0 hours
Exercises	0.0 %	0 hours
Group work	0.0 %	0 hours
Other individual studying	0.0 %	0 hours
TOTAL	0.0 %	75 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

Session 1-2   Introduction to International Public Finance and the role of International Financial Institutions

Working Paper: IMF Annual Report 2021

Article: ´The IMF undergoes structural reform´, (The Economist, Feb 15th 2020) (ced)

Article: Battling stigma. The IMF is in search of a role, and a happier reputation (The Economist, Mar 26th 2009) (ced)

Article: Arvind Subramanian, ´How the IMF Failed Greece`, (Project Syndicate, August 2015)

Article: Joseph Stiglitz, ´Europe´s Attack on Greek Democracy´, (Project Syndicate, June 2019)

Article: Raja Khalidi, ´A Financial New Deal for Palestine´, (Project Syndicate, May 2021)
Article: Mohamed A.El-Erian, ´How the IMF Can Battle Gradual Irrelevance´, (Project Syndicate, November 2019)

SESSIONS 3 - 4 (LIVE IN-PERSON)

Session 3-4   Public Income and Public Expenditures

Working Paper: Tax Policy Center Report;
Article: Hans Eichel; Yannis Palaiokrassas ´Smart Taxes´, (Project Syndicate, May 31, 2012)
Article: J. Bradford Delong; ´Saved by Taxes´. (Project Syndicate, Dec 29, 2006)
Article: Kemal Dervis, ´Getting Carbon Border Taxes Right´, (Project Syndicate, Feb 11, 2020)
Article: Kenneth Rogoff, ´Why Wealth Taxes are not Enough´, (Project Syndicate, Nov 4, 2013)
Article: Andrés Velasco, ´Austerity According to St. Augustine´, (Project Syndicate, Mar 30, 2012)

SESSIONS 5 - 6 (LIVE IN-PERSON)

Session 5-6   Public Investment and Public Debt

Book Chapters: Turner, A. (2015), Between Debt and the Devil: Money, Credit, and Fixing Global Finance, Princeton, NJ, Princeton University Press (IE Library)
Article: 'Picking Winners, Saving Losers: The Global Revival of Industrial Policy', (The Economist, 5 August 2010) (ced)
Article: S.K. How much is too much? (The Economist, 3 June 2015) (ced)

SESSIONS 7 - 8 (LIVE IN-PERSON)

Session 7-8   Public Growth and Price Stability

Article: Summers, L. H. (2016), 'The Age of Secular Stagnation: What It Is and What to Do about It', (Foreign Affairs, 95(2)) (ced)
Article: Varoufakis, Yanis (2022) ´Inflation as a Political Power Play Gone Wrong´; (Project Syndicate , Jun 22, 2022)
Article: Krueger, Anne (2022), ´How to Fuel Inflation and Harm the Environment´ (Project Syndicate, Jun 21, 2022)

SESSIONS 9 - 10 (LIVE IN-PERSON)

Session 9-10   Public Financing and Innovation

Book Chapters: F. L., and Keller, M. R. (2011), State of Innovation: The US Government's Role in Technology Development, Boulder, CO, Paradigm. (Not Available at IE Library)
Book Chapters: Mariana Mazzucato: The Entrepreneurial State
Article: Arthur D. Little, The Role of Government in Fostering Innovation (adlittle.com)

SESSION 11 (ASYNCHRONOUS)

Session 11.   IFI: IMF Article IV Report
- Read the most recent IMF Article IV on a specific country.
- Write an executive summary on it and comment on the country's actions on the specific recommendations

SESSION 12 (ASYNCHRONOUS)

Session 12.   IFI: World Bank

Assignments:

- Read the most recent World Bank report on a specific country.

- Write an executive summary on it and comment on the country's actions on the specific recommendations

SESSION 13 (ASYNCHRONOUS)

Session 13.   IFI: Others (European Commission - Country Report)

- Read the most recent other IFIs report on a specific country.

- Write an executive summary on it and comment on the country's actions on the specific recommendations

Other / Complementary Documentation: 2022 European Semester: Country Reports

SESSION 14 (LIVE IN-PERSON)

Session 14. Group Presentations / Review Final Exam

Assignments:

- Group Presentations: Report and presentation on a country comparison on main Public Finance indicators including IFI´s reports

SESSION 15 (LIVE IN-PERSON)

Session 15.   FINAL EXAM

EVALUATION CRITERIA

Criteria	Percentage	Comments
Final Exam	40 %	Short questions
Individual Work	20 %	8-10 pages
Group Presentation	30 %	Country Analysis
Class Participation	10 %	Active participation

PROFESSOR BIO

Professor: **GREGORIO BUSTOS SERRANO**

E-mail: gbustos@faculty.ie.edu

GREGORIO BUSTOS SERRANO

Received a Master´s degree from the Harvard Kennedy School of Government. Also received a Master´s degree on International Management from the Thunderbird Graduate School, and a B.A. from St. Andrews College (Summa Cum Laude). He has advanced degrees from the Deusto Business School and IESE.

He has more than 20 years of experience in multinational positions in the automotive industry. Leading financial and strategy departments in Germany, Spain, and several countries in Asia. He has led negotiations with local and international authorities on foreign direct investments and business developments. Expert on new technologies, including new electric cars.

Experienced on economic development based on the Economic Complexity method developed by the Center for International Development of the Harvard Kennedy School. He has led public initiatives such as "Spain 2030"and "Cambridge Manifest on Spanish Science". He has written several articles for Spanish and international news-papers.

OTHER INFORMATION

War, Peace, International Relations and Philosophy of Right. Immanuel Kant vs Carl Schmitt: A Philosophical Confrontation

IE University
Professor: **ÁLVARO CORTINA URDAMPILLETA**

E-mail: acortina@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
There are no prerequisites for this course.

SUBJECT DESCRIPTION

As we can see well nowadays the questions of war, peace, political order and the idea of the source of right are not just philosophical issues but real questions and real problems. The German philosophers Immanuel Kant, in the Enlightment, and Carl Schmitt, in the XX Century, have shaped political thinking, philosophy of right and international relations throughout contemporary history. This course introduces the students to the most important topics of these two fascinating frameworks but also puts both in debate. Philosophy started as a dialectical discipline. We will see to what extent Kant and the controversial Schmitt are opposed or not: their confronted views on the most universal political-philosophical issues may inspire us to understand the current situation of the global world and current issues like the war in Ucrania.

The course provides students with the theoretical foundations for a critical understanding of central issues of two complex political thinkers as well as an authoritative outlook on the emergence and evolution of contemporary thought, from XVIII Century to post-Second World War.

Students will develop the ability to read, understand, digest and debate the ideas covered in the course. This will ultimately allow them to fully understand the complex origins of current political systems, claims and conflicts. They will see the present issues of global politics and modern political thought with a new deeper perspective.

OBJECTIVES AND SKILLS

Objectives

1.   Providing students with basic concepts central to political theory and acquainting them withfoundational texts.

2.   Placing ideas in their historical context.

3.   Explaining key arguments for and against different values and institutional arrangements.

Skills

1. Use of and sensitivity towards primary texts.
2. The analysis and critical assessment of arguments and theories.
3. The ability to formulate and express a persuasive interpretation.

METHODOLOGY

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	40.0 %	30 hours
Discussions	13.33 %	10 hours
Exercises	46.67 %	35 hours
Group work	0.0 %	0 hours
Other individual studying	0.0 %	0 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSION 1 (LIVE IN-PERSON)

General introduction. Works of Immanuel Kant and Carl Schmitt.

Kant: What is Enlightment?

Book Chapters: Kant: political writings. Ed. Hans Reiss. Cambridge University Press, 1994, pp 54-61
(See Bibliography) (Optional)

SESSION 2 (LIVE IN-PERSON)

Kant: The perpetual peace

Book Chapters: Kant: political writings. Ed. Hans Reiss. Cambridge University Press, 1994, pp. 93-
130 (See Bibliography) (Optional)

SESSION 3 (LIVE IN-PERSON)

Kant: Idea for a Universal History with a Cosmopolitan Purpose

Book Chapters: Kant: political writings. Ed. Hans Reiss. Cambridge University Press, 1994, pp. 41-
54 (See Bibliography) (Optional)

SESSION 4 (LIVE IN-PERSON)

Kant: Groundwork of the Metaphysics of Morals

Summary of Kant's ethics. No specific readings needed.

SESSION 5 (LIVE IN-PERSON)

Kant: Metaphysics of Morals (I)

Book Chapters: Kant: political writings. Ed. Hans Reiss. Cambridge University Press, 1994, pp. 131-

136 (See Bibliography) (Optional)

SESSION 6 (LIVE IN-PERSON)
Kant: Metaphysics of Morals (II)
Book Chapters: Kant: political writings. Ed. Hans Reiss. Cambridge University Press, 1994, pp. 136-176 (See Bibliography) (Optional)

SESSION 7 (LIVE IN-PERSON)
Kant: Metaphysics of Morals (III)
Book Chapters: Kant: political writings. Ed. Hans Reiss. Cambridge University Press, 1994, pp. 136-176 (See Bibliography) (Optional)

SESSION 8 (LIVE IN-PERSON)
Schmitt: Political Romanticism
Book Chapters: Political Romanticism. Trans Guy Oakes The MIT Press Year: 1991, pp. 215 (IE Library) (Optional)

SESSION 9 (LIVE IN-PERSON)
Schmitt: Political Theology: Four Chapters on the Concept of Sovereignty.
Book Chapters: Political Theology: Four Chapters on the Concept of Sovereignty . Trans. George Schwab The MIT 1986, pp. 48 (IE Library)

SESSION 10 (LIVE IN-PERSON)
Schmitt: Political Theology: Four Chapters on the Concept of Sovereignty.
Book Chapters: Political Theology: Four Chapters on the Concept of Sovereignty . Trans. George Schwab The MIT 1986, pp. 48 (IE Library) (Optional)

SESSION 11 (LIVE IN-PERSON)
Schmitt: The Concept of the Political
Book Chapters: The Concept of the Political: Expanded Edition; foreword by Tracy B. Strong; with Leo Strauss's notes University Of Chicago Press   2007, pp. 159 (IE Library) (Optional)

SESSION 12 (LIVE IN-PERSON)
Schmitt: The Leviathan in the State Theory of Thomas Hobbes: Meaning and Failure of a Political Symbol
Book Chapters: The Leviathan in the state theory of Thomas Hobbes: meaning and failure of a political symbol. Trans. G. Schwab. Greenwood Publishing 1996, pp.121 (IE Library)

SESSION 13 (LIVE IN-PERSON)
Schmitt: Theory of the Partisan.
Book Chapters: Theory of the partisan. Trans G. Ulmen. Telos Press, 2007, p. 120 (IE Library)

SESSION 14 (LIVE IN-PERSON)

Schmitt: The Nomos of the Earth in the International Law of the Jus Publicum Europaeum. Part IV: The New Nomos of the Earth.

Book Chapters: The Nomos of the Earth in the International Law.Trans. G. Ulmen, Telos Press2003 (IE Library)

SESSION 15 (LIVE IN-PERSON)

-Schmitt: The Nomos of the Earth in the International Law of the Jus Publicum Europaeum. Part IV (II)

-Kant and Schmitt: a summary

Book Chapters: The Nomos of the Earth in the International Law . Trans. G. Ulmen.Telos Press 2003, pp. 214-320 (IE Library) (Optional)

BIBLIOGRAPHY

Recommended

- Höffe, O.. *Immanuel Kant.* 1994. SUNY. ISBN 0791420949 (Digital)
  See the section on Politics and Ethics.
  null

- VVAA. (2017). *The Oxford Handbook of Carl Schmitt..* Jens Meierhenrich and Oliver Simons, eds.. Oxford University Press. ISBN 9780199916 (Digital)

  null

- Ojakangas Mika,. (2006). *A Philosophy of Concrete Life: Carl Schmitt and the political thought of late modern.* Peter Lang. ISBN 3039109634 (Digital)

  null

- Kant, I.. (1994). *Kant: political writings. Ed. Hans Reiss. ,.* Cambridge University Press. ISBN 0521391857 (Digital)

  null

- Flikschuh, Katrin. *Kant and modern political philosophy.* Cambridge University Press, 2004. ISBN 0511033737 (Digital)

  null

EVALUATION CRITERIA

This class is built around a set of core readings. Along the course we will read together those texts. The reading in class may promote the active discussion of classics.

The **Individual Presentation** only requires to study one of these texts: lectures or chapters of books. The student may be able to explain the contents of the text.

The **Short Essay** will deal with a concrete topic from the Kant/Schmitt confrontation. The student may chose his/her topic, but it has to quote at least one of the two philosophers and develop his ideas. It will be a 7 pages essay (including both the title page and the bibliography page; interline space: 1.5).

GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course.

For every BIR Program mandatory class aside from the IR Unplugged and BIR Electives, students are required to obtain the minimum grade of 5 required to pass the course. Students whose grade in the Final Exam (or the largest assignment) is below 5 will fail the course. The rule applies to whichever assignment carries the greatest weight to the final grade. Dates and location of the final exam will be posted in advance and will not be changed.

Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year).

Students who are in the third or fourth attempt must contact the professor during the first two weeks of the course.

The Bachelor's in International Relations pursues to develop the knowledge, skills and attitudes for bringing transformative and sustainable change in today´s world. Therefore, all the courses follow the principles of sustainability and diversity. Firstly, this course considers the agenda 2030 and builds upon the Sustainable Development Goal, Peace, Justice and Strong Institutions and Partnerships for the goals. Secondly, this course is committed to an inclusive learning environment and looks to be enriched and enhanced by diversity along numerous dimensions, including race, ethnicity and national origins, gender and gender identity, sexuality, class and religion.

ATTENDANCE

Attendance is mandatory at IE University, as it is an essential factor of IE´s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year.

Please pay close attention to your attendance. The program strongly encourages attending 100% of the sessions as it will improve your learning outcomes, it will increase the class performance and it will benefit your participation grade. Noncompliance with deadlines for Non-Classroom Learning activities or assignments will result in an absence for the session.

Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other cases of force majeure, are to be consulted with the Program Management (bir.biemadrid@ie.edu) for assessment of the situation and corresponding documentation, in order to support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility).

Grading for retakes will be subject to the following rules:

The retakes will consist of a comprehensive exam. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.

The exam will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

Dates and location of the retakes will be posted in advance and will not be changed.

PLAGIARISM / ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

providing faulty sources;

copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;

copy-pasting material from external sources even while citing them;

using verbatim translations from sources in other languages without citing them;

copy-pasting material from external sources without citing them;

and buying or commissioning essays from other parties.

IEU students must contact the professor if they don't know whether the use of a document constitutes plagiarism. For help with your academic writing, contact the Writing Center (writingcenter@faculty.ie.edu). The professor will also advise the student on how to present said material. All written assignments must be submitted through Turn-it-in, which produces a similarity report and detects cases of plagiarism. Professors are required to check each student's academic work in order to guarantee its originality. If the originality of the academic work is not clear, the professor will contact the student in order to clarify any doubts. Students using external tutorial support should report it to the professor and the BIR Program from the moment they began receiving this support. In the event that the meeting with the student fails to clarify the originality of the academic work, the professor will inform the Director of the Bachelor Program about the case, who will then decide whether to bring the case forward to the BIR Academic Review Panel. Very high similarity scores will be automatically flagged and forwarded to the Academic Review Panel. Plagiarism constitutes a very serious offense and may carry penalties ranging from getting a zero for the assignment to expulsion from the university depending on the severity of the case and the number of times the student has committed plagiarism in the past.

Criteria	Percentage	Comments
Individual Presentation	20 %	
Individual Work	80 %	

PROFESSOR BIO

Professor: **ÁLVARO CORTINA URDAMPILLETA**

E-mail: acortina@faculty.ie.edu

ÁLVARO CORTINA URDAMPILLETA

Álvaro Cortina (Bilbao, 1983) is doctor in Philosophy (Leiden University/Diego Portales University, 2019), degree in Philosophy from the University of Navarra (2006) and master in Philosophy from the Complutense University of Madrid (2013). He has written three books: Deshielo y Ascensión (Jekyll&Jill, 2013), Bergson and the Aristotelian model of immanente teleology (Leiden University, 2019) and Abisal (Jekyll&Jill, 2021); and soon will publish his fourth: El espejo y el oráculo. De lo sublime estético a lo práctico mundano en Arthur Schopenhauer (Guillermo Escolar, 2022). Besides he writes regularly for several magazines and newspapers like El Cultural. He has studied and taught in Santiago de Chile, Paris, Berlin and Leiden.

OTHER INFORMATION

Office hours available by appointment: Friday Morning before or after the course.

Email:

acortina@faculty.ie.edu or alvarocortina@hotmail.com

CODE OF CONDUCT IN CLASS

1. Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific session may be granted an exception (at the discretion of the professor). Students attending online must always have their cameras on during the session or risk being marked absent.

2. If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names.

3. Do not leave the room during the lecture: Students are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor).

4. Do not engage in side conversation. As a sign of respect toward the person presenting the lecture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent".

5. Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent".

6. No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence.

7. Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward,

ETHNICITY AND NATIONALISM

IE University
Professor: **EMMY LINDSTAM**

E-mail: elindstam@faculty.ie.edu

Academic year: 23-24
Degree course: FOURTH
Semester: 1º
Category: OPTIONAL
Number of credits: 3.0
Language: English

PREREQUISITES
There are no prerequisites for this course.

SUBJECT DESCRIPTION
What is a nation? Who "truly" belongs to the nation and how do feelings of national belonging condition political behaviour? Do we choose who we are and why do certain identities appear to matter more to people in some contexts than in others? What are the consequences of how we perceive the nation for democratic outcomes and violent conflict? These are some of the many questions we will cover in this course on nationalism and ethnicity. In this course, students will learn about key concepts and theoretical approaches in the study of nationalism and ethnicity, acquiring different analytical tools to help analyze important socio-political identities from a scientific perspective.

OBJECTIVES AND SKILLS
At the end of this course, students should be familiar with key concepts and theoretical approaches to the study of identity, nationalism and ethnicity. Students should be familiar with classic theories of nationalism, as well as recent research published in top journals on the topics of nationalism and ethnicity. Students should also have a general understanding of how social identification can be measured and studied empirically. Specifically, students will be able to:

- Discuss and compare different understandings of national and ethnic identities.
- Show an understanding for different forms of nation-building as well as the role of the state and cultural entrepreneurs in constructing and sustaining different ideas of nationhood.
- Show an understanding for the consequences of national and ethnic identities for political behavior, democracy and violent conflict.
- Apply important concepts and theories to current societal challenges and events.
- Develop and formulate their own research questions within the subfield.
- Show a general understanding of the different types of measures and approaches available for theory testing.

METHODOLOGY

To achieve these learning outcomes, we will read scholarship from political science and related disciplines that utilize a variety of social science methods to understand the origins, persistence, and implications of social identification in general, and ethnic and national forms of group identification in particular. Through a mix of lectures, discussions, case studies, group exercises, workshops and simulations we will acquire new theoretical insights, as well as put them into practice. Each session will be divided roughly into two parts. The first part of the session will be lecture-style (although questions and discussions are welcome). We will cover material from the readings and discuss examples. The second part of the session will be more practical. We will carry out discussions and group activities, applying what we discussed in class.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	29.33 %	22 hours
Discussions	9.33 %	7 hours
Exercises	22.67 %	17 hours
Group work	6.67 %	5 hours
Other individual studying	32.0 %	24 hours
TOTAL	100.0 %	75 hours

PROGRAM

SESSIONS 1 - 2 (LIVE IN-PERSON)

What is a Nation? Nation-Building and National Identity

Mandatory Readings:

- Mylonas, Harris & Maya Tudor. 2021. "Nationalism: What We Know and What We Still Need to Know." *Annual Review of Political Science.* 24:109-132.
- Reicher, Stephen & Nick Hopkins. 2001. *Self and Nation: Categorization, Contestation and Mobilization.* Sage. Lonon. **Ch. 1**

Recommended Readings:

- Anderson, Benedict. 1983. *Imagined Communities: Reflections on the Origin and Spread of Nationalism.* Verso. London. **Ch 1.**
- Michael Billig. 1995. *Banal Nationalism.* Sage. London. **Ch 3.**
- Connor, Walker. 1978. "A Nation is a Nation, is a State, is an Ethnic Group is a..." *Ethnic and Racial Studies.* 1(4): 377-400.
- Wimmer, Andreas. 2018. *Nation Building: Why Some Countries Come Together While Others Fall Apart.* Princeton University Press. **Ch 1.**

Article: Nationalism: What We Know and What We Still Need to Know (Annual Review of Political Science) (CED)
Book Chapters: Self and Nation: Categorization, Contestation and Mobilization (Chapter 1: The National Question) (CED)
Book Chapters: Imagined Communities: Reflections on the Origin and Spread of Nationalism (Chapter 1: Introduction) (CED) (Optional)
Article: A Nation is a Nation, is a State, is an Ethnic Group is a... (Ethnic and Racial Studies, 1:4, 377-400) (CED) (Optional)

Book Chapters: Banal Nationalism (Chapter 3) (See Bibliography) (Optional)
Book Chapters: Nation Building: Why Some Countries Come Together While Others Fall Apart
(Chapter 1: Relational Theory and Nested Methods) (CED) (Optional)

SESSIONS 3 - 4 (LIVE IN-PERSON)

Do We Choose Who We Are? The Nature of Identity

Mandatory Readings:

- Tajfel, Henri & John Turner. 1986. "The Social Identity Theory of Intergroup Behvior." in *The Psychology of Intergroup Relations.*
- Kalin, Michael & Nicholas Sambanis. 2018. "How to Think About Social Identity". *Annual Review of Political Science.* 21:239-257.

Recommended Readings:

- Chandra, Kanchan. 2006. "What is Ethnic Identity and Does it Matter?". *Annual Review of Political Science.* 9: 397-424.
- Fouka,Vasiliki & Marco Tabellini. 2021. "Changing In-Group Boundaries: The Effect of Immigration on Race Relations in the United States". *American Political Science Review.* 1-17.
- Posner, Daniel. 2004. "The Political Salience of Cultural Difference: Why Chewas and Tumbukas are Allies in Zambia and Adversaries in Malawi". *American Political Science Review.* 98(4): 529-545.
- Sambanis, Nicholas & Moses Shayo. 2013. "Social Identification and Ethnic Conflict.". *American Political Science Review.* 107(2): 294-325.
- Wimmer, Andreas. 2013. *Ethnic Boundary Making: Institutions, Power, Networks.* Oxford University Press. **Ch 3.**

Book Chapters: The Social Identity Theory of Intergroup Behvior (Political Psychology) (CED)
Article: How to Think About Social Identity (Annu. Rev. Political Sci. 2018. 21:239–57) (CED)
Article: What is Ethnic Identity and Does it Matter? (Annu. Rev. Polit. Sci. 2006. 9:397–424) (CED)
(Optional)
Article: Changing In-Group Boundaries:The Effect of Immigration on Race Relations in the United States (American Political Science Review (2021) 1–17) (CED) (Optional)
Article: The Political Salience of Cultural Difference: Why Chewas and Tumbukas are Allies in Zambia and Adversaries in Malawi (The American Political Science Review , Nov., 2004, Vol. 98, No. 4 (Nov., 2004), pp. 529-545) (CED) (Optional)
Article: Social Identification and Ethnic Conflict (American Political Science Review Vol. 107, No. 2 May 2013) (CED) (Optional)
Book Chapters: Ethnic Boundary Making: Institutions, Power, Networks (ch. 3) (See Bibliography) (Optional)

SESSIONS 5 - 6 (LIVE IN-PERSON)

National Belonging and Political Behavior

Mandatory Readings:

- Simonsen, Kristina. 2020. "Politics Feeds Back: The Minority/Majority Turnout Gap and Citizenship in Anti-Immigrant Times." *Perspectives on Politics.* 19(2): 406-421.
- Haas Nicholas & Emmy Lindstam. 2022. "My History or Our History? Historical Revisionism

and Entitlement to Lead". *Working Paper.*

Recommended Readings:

- Charnysh, Volha; Lucas Christopher & Prerna Singh. 2015. "The Ties that Bind: National Identity Salience and Pro-Social Behavior Toward the Ethnic Other". *Comparative Political Studies.* 48(3): 267-300.
- Verkyten, Maykel. 2017. "Dual Identity and Immigrants' Protest against Discrimination: The Moderating Role of Diversity Ideologies". *Group Processes and Intergroup Relations.* 20(6): 924-934.
- Fouka, Vasiliki. 2019. "How do Immigrants Respond to Discrimination? The Case of Germans in the US During World War I." *American Political Science Review.* 1-18.
- Hopkins, Nick & Leda Blackwood. 2011. "Everyday Citizenship: Identity and Recognition." *Journal of Community & Applied Social Psychology.* 21: 215-227.

Due: **Essay 1** – Response paper based on 3-4 mandatory or suggested readings from Sessions 1-4.

Article: Politics Feeds Back: The Minority/Majority Turnout Gap and Citizenship in Anti-Immigrant Times (Vol. 19/No. 2; Perspectives on Politics) (CED)

Working Paper: My History or Our History? Historical Revisionism and Entitlement to Lead (July 3, 2022) (CED)

Article: The Ties that Bind: National Identity Salience and Pro-Social Behavior Toward the Ethnic Other (Comparative Political Studies 2015, Vol. 48(3) 267– 300) (CED) (Optional)

Article: Dual Identity and Immigrants' Protest against Discrimination: The Moderating Role of Diversity Ideologies (Group Processes & Intergroup Relations 2017, Vol. 20(6) 924– 934) (CED) (Optional)

Article: How do Immigrants Respond to Discrimination? The Case of Germans in the US During World War I (American Political Science Review) (CED) (Optional)

Article: Everyday Citizenship: Identity and Recognition (Journal of Community & Applied Social Psychology 21: 215–227 (2011) (CED) (Optional)

SESSIONS 7 - 8 (ASYNCHRONOUS)

Is There a Good Nationalism?

Mandatory readings

- Brown, David. 1999. "Are There Good and Bad Nationalisms?" *Nations and Nationalisms.* 5(2): 281-302.
- Recent newspaper articles and opinion pieces will be made available to students

Due: **Essay 2** – Opinion piece on topic: "Is there a Good Nationalism?"

Article: Are There Good and Bad Nationalisms? (Nations and Nationalism 5 (2), 1999, 281-302) (CED)

SESSIONS 9 - 10 (LIVE IN-PERSON)

Identity and Nationalist Violence

Mandatory readings:

- Schrock-Jacobson, Gretchen. 2012. "The Violent Consequences of the Nation: Nationalism and the Initiation of Interstate War." *Journal of Conflict Resolution.* 56(5): 825-852.

- Nair, Gautam & Nicholas Sambanis. 2019. "Violence Exposure and Ethnic Identification: Evidence from Kashmir." *International Organization.* 72: 329-363.

Recommended Readings:

- King, Elisabeth. 2014. *From Classrooms to Conflict in Rwanda.* Cambridge University Press. **Ch 1.**
- Cederman, Lars-Erik; Weidemann, Nils & Kristian Skrede Gleditsch. 2011. "Horizontal Inequalities and Ethnonationalist Civil War: A Global Comparison." *American Political Science Review.* 105(3): 478-495.
- Nicholas Sambanis. 2000. "Partition as a Solution to Ethnic War: An Empirical Critique of the Theoretical Literature". *World Politics.* 52: 437-483.
- Scott Strauss. 2015. *Making and Unmaking Nations: War, Leadership and Genocide in Modern Africa.* Cornell University Press. **Ch 3.**

Article: The Violent Consequences of the Nation: Nationalism and the Initiation of Interstate War (Journal of Conflict Resolution 56(5) 825-852) (CED)
Article: Violence Exposure and Ethnic Identification: Evidence from Kashmir (International Organization 73, Spring 2019, pp. 329–63) (CED)
Article: Horizontal Inequalities and Ethnonationalist Civil War: A Global Comparison (American Political Science Review Vol. 105, No. 3 August 2011) (CED) (Optional)
Article: Partition as a Solution to Ethnic War: An Empirical Critique of the Theoretical Literature (World Politics 52 (July 2000), 437-83) (CED) (Optional)
Book Chapters: From Classrooms to Conflict in Rwanda (1. Moving Education from the Margins to the Mainstream) (CED) (Optional)
Book Chapters: Making and Unmaking Nations: War, Leadership and Genocide in Modern Africa (Chapter 3: A Theory of Genocide) (CED) (Optional)

SESSIONS 11 - 12 (LIVE IN-PERSON)

Workshop: Studying Nationalism and Identity Empirically

Mandatory readings

- Huddy, Leonie; Del Pone, Alessandro & Caitlin Davies. 2021. "Nationalism, Patriotism, and Support for the European Union." *Political Psychology.* 6: 995-1017.
- Jacobs, Carly & Elizabeth Theiss-Morse. 2013. "Belonging in a "Christian Nation": The Explicit and Implicit Associations between Religion and National Group Membership." *Politics and Religion.* 6: 373-401.

Recommended Readings:

- Atkin, David; Colson-Sihra, Eve & Moses Shayo. 2021. "How Do We Choose Our Identity? A Revealed Preference Approach Using Food Consumption." *Journal of Political Economy.* 129(4): 1193-1251.
- Lindstam, Emmy; Mader, Matthias & Harald Schoen. 2021. "Conceptions of National Identity and Ambivalence towards Immigration." *British Journal of Political Science.* 51:93-114.
- Shayo, Moses. 2009. "A Model of Social Identity with an Application to Political Economy: Nation, Class, and Redistribution." *American Political Science Review.* 103(2): 147-174.

Article: Nationalism, Patriotism, and Support for the European Union (Political Psychology, Vol. 42, No. 6, 2021) (CED)

Article: Belonging in a "Christian Nation": The Explicit and Implicit Associations between Religion and National Group Membership (Politics and Religion, 6 (2013), 373–401) (CED)
Article: Conceptions of National Identity and Ambivalence towards Immigration (British Journal of Political Science (2021), 5 1, 93– 114) (CED) (Optional)
Article: How Do We Choose Our Identity? A Revealed Preference Approach Using Food Consumption (Journal of Political Economy, 2021, vol. 129, no. 4) (CED) (Optional)
Article: A Model of Social Identity with an Application to Political Economy: Nation, Class, and Redistribution (American Political Science Review Vol. 103, No. 2 May 2009) (CED) (Optional)

SESSIONS 13 - 14 (LIVE IN-PERSON)

Case Studies and In-Class Simulation

Material to prepare each case study (opinion pieces, newspaper articles, videos etc.) will be made availabe prior to this session.

Due: **Essay 3** – Research Note

SESSION 15 (LIVE IN-PERSON)

Final Exam

BIBLIOGRAPHY

Compulsory

- Stephen Reicher and Nick Hopkins. (2001). *Self and Nation.* Sage. ISBN 9780761969204 (Digital)

Recommended

- Andreas Wimmer. (2013). *Ethnic boundary making : institutions, power, networks.* ISBN 0199980535 (Digital)

EVALUATION CRITERIA

Detailed requirements:

Class participation and forum discussions: In preparation for each session, you are expected to read the mandatory readings before class so that you attend the seminar prepared and participate actively in class discussions. In addition, I list helpful background readings, including books and journal articles, that relate to the core readings. You should be aware that some of the readings rely on more advanced quantitative methods. You are not being asked to grasp these in detail. Nevertheless, you should make sure that you can identify the questions the authors are asking and the arguments they are propounding. In addition to your active participation in class, you are expected to participate in forum discussions online on topics of relevance to the class material.

Short essays: You will be asked to write three short essays during the course of this class. Each essay will be approximately 3 pages long. The first essay is a response paper in which you will be asked to select a number of articles from the mandatory and suggested readings and analyze these papers in depth. The second essay is an opinion piece in which – based on the assigned readings – you will be asked to elaborate and take a stance on the question "Is there a good nationalism?" The final essay is a short research note in which you are expected pose a research question and explore this question empirically, using survey data.

Final exam: The final exam will be a comprehensive exam covering the material discussed in class.

Criteria	Percentage	Comments
Final Exam	40 %	
Class Participation + Discussion Questions	15 %	
Essay 1	15 %	
Essay 2	15 %	
Essay 3	15 %	

PROFESSOR BIO

Professor: **EMMY LINDSTAM**

E-mail: elindstam@faculty.ie.edu

Emmy Lindstam is an Assistant Professor at IE University. She received her Ph.D. from the Center for Doctoral Studies in Social and Behavioral Sciences at the University of Mannheim in 2022. During her studies, she was a visiting PhD student at UC Berke- ley and a pre-doctoral fellow at CESS-Nuffield Flame University in Pune. She holds a master's degree in Political Science from the University of Mannheim and a bachelor's degree in Political Science and Public Administration from the University of Barcelona. Emmy carries out research in the areas of comparative politics and political psychology, with a focus on identity politics and a regional interest in Europe and India. More information can be found at emmylindstam.com.

OTHER INFORMATION
GENERAL OBSERVATIONS

Each student has four attempts over two consecutive academic years to pass this course. Dates and location of the final exam will be posted in advance and will not be changed. Students must attend at least 70% of the sessions. Students who do not comply with the 70% attendance rule will receive a 0.0 on their first and second attempts and go directly to the third one (they will need to enroll in this course again the following academic year). Students who are in the third or fourth attempt should contact the professor during the first two weeks of the course.

ATTENDANCE

Attendance is mandatory at IE University, as it is an essential factor of IE s learning methodology. While we do closely monitor attendance in each course, we also consider our students responsible for their own agenda and commitments, as adult university students. With that in mind, each student may miss up to 30% of the sessions within a given course and still maintain the possibility of passing that given course. This 30% "buffer" is to be used for any absences, such as: illnesses, personal emergencies, commitments, official/governmental matters, business and/or medical appointments, family situations, etc. Students should manage their various needs, and situations that may arise, within that 30% buffer. If a student is absent to more than the allowed 30% of the sessions (regardless of the reason), s/he will obtain a 0.0 grade for that course in both the ordinary and extraordinary calls of the current academic year, and s/he will have to retake the course during the following academic year. Having established the rule, we strongly discourage to use this buffer as granted, we highly recommend to attend 100% of the classes as it will improve your learning outcomes, it will increase the class performance and it might improve your participation grade. Extreme cases involving emergencies such as: extended hospitalizations, accidents, serious illnesses and other contexts involving force majeure, are to be consulted with the Program Management team for assessment of the situation and corresponding documentation, so that Program Management can support and guide each student optimally.

RETAKE POLICY

Any student whose weighted final grade is below 5 will be required to sit for the retake exam to pass the course (except those not complying with the attendance rules, whom are banned from this possibility). Grading for retakes will be subject to the following rules:

- The retakes will consist of a comprehensive exam. The grade will depend only on the performance on this exam; continuous evaluation over the semester will not be taken into account.
- The exam will be designed bearing in mind that the passing grade is 5 and the maximum grade that can be attained is 8 out of 10.

PLAGIARISM/ACADEMIC HONESTY

Plagiarism is the dishonest act of presenting another person's ideas, texts or words as your own. This includes in order of seriousness of the offense:

- providing faulty sources;
- copy-pasting material from your own past assignments (self-plagiarism) without the instructor's permission;
- copy-pasting material from external sources even while citing them;
- using verbatim translations from sources in other languages without citing them;
- copy-pasting material from external sources without citing them;
- and buying or commissioning essays from other parties.

OTHER INFORMATION

- Office hours: by appointment.
- Contact details: elindsta@faculty.ie.edu.

CODE OF CONDUCT IN CLASS

Be on time. Students arriving more than 5 minutes late will be marked as "Absent". Only students that notify in advance in writing that they will be late for a specific ses- sion may be granted an exception (at the discretion of the professor). If applicable, bring your name card and strictly follow the seating chart. It helps faculty members and fellow students learn your names. Do not leave the room during the lecture: Stu- dents are not allowed to leave the room during lectures. If a student leaves the room during lectures, he/she will not be allowed to re-enter and, therefore, will be marked as "Absent". Only students that notify that they have a special reason to leave the session early will be granted an exception (at the discretion of the professor). Do not engage inside conversation. As a sign of respect toward the person presenting the lec- ture (the teacher as well as fellow students), side conversations are not allowed. If you have a question, raise your hand and ask it. It you do not want to ask it during the lecture, feel free to approach your teacher after class. If a student is disrupting the flow of the lecture, he/she will be asked to leave the classroom and, consequently, will be marked as "Absent". Use your laptop for course-related purposes only. The use of laptops during lectures must be authorized by the professor. The use of Social Media or accessing any type of content not related to the lecture is penalized. The student will be asked to leave the room and, consequently, will be marked as "Absent". No cellular phones: IE University implements a "Phone-free Classroom" policy and, therefore, the use of phones, tablets, etc. is forbidden inside the classroom. Failing to abide by this rule entails expulsion from the room and will be counted as one absence. Escalation policy: 1/3/5. Items 4, 5, and 6 above entail expulsion from the classroom and the consequent marking of the student as "Absent." IE University implements an "escalation policy": The first time a student is asked to leave the room for disciplinary reasons (as per items 4, 5, and 6 above), the student will incur one absence, the second time it will count as three absences, and from the third time onward, any expulsion from the classroom due to disciplinary issues will entail 5 absences.

INTERNSHIP

IE University
Professor: **ANDREW BERTOLI**
E-mail: abertoli@faculty.ie.edu
Academic year: 23-24
Degree course: FOURTH
Semester: 1st
Category: OPTIONAL
Number of credits: from 6 to 30
Language: English

PREREQUISITES

IE University and the partner organization hosting the internship must sign an Educational Cooperation Agreement prior to the start of the internship.

The Agreement outlines the relationship between the student, the collaborating organization, and the University. The Agreement must be followed, whether the internship was obtained through the IE Careers department or directly by the student.

The student may not do the internship at an organization where he/she has a prior or current contractual relationship or a close family connection, played a founding role, holds shares, or retains any ownership.

IE University cannot sign an Educational Cooperation Agreement if the internship is scheduled to end more than two months after the student's expected graduation date (if, for instance, the student is expected to finish in July of their 4th year, the internship could not continue after the 30th of September).

If the internship takes place outside of the Spanish territory, the student must inform the University at least (15) days prior to departure so insurance can be arranged.

Some countries require visas for curricular internships. In such cases it is the student's responsibility to research and obtain the visa, although the Student Services Office may provide support. IE University and the partner organization hosting the internship must sign an Educational Cooperation Agreement prior to the start of the internship.

The Agreement outlines the relationship between the student, the collaborating organization, and the University. The Agreement must be followed, whether the internship was obtained through the IE Careers department or directly by the student.

SUBJECT DESCRIPTION

Curricular internships are considered part of the students' academic training and are supervised by the university. They are designed to give students the opportunity to apply the knowledge and skills they have acquired during their course work in a professional context, to learn the working practices of a professional organization, and to be exposed to real-life business activities and situations. The curricular internship helps prepare students for future professional activities, facilitates their employability, and promotes their entrepreneurial abilities.

The internship is considered an elective course. The student may choose among the following options (the student may work more hours if the student, the professional tutor, and the academic tutor agree):

- A 6ECTS internship, requiring a minimum of 180 hours of work
- A 15 ECTS internship, requiring a minimum of 450 hours of work
- An 18 ECTS internship, requiring a minimum of 540 hours of work
- A 30 ECTS internship, requiring a minimum of 900 hours of work

Curricular internships should be carried out during the last final semesters of the last academic year of the Program when their elective cretits are allocated. However, students may begin their internships as early as the end of the previous academic year to complete the hours necessary to obtain the number of credits they have selected.

OBJECTIVES AND SKILLS

-Deepen and apply knowledge and skills previously acquired studied in coursework

-Specialize in a specific area within the field of International Relations

-Become familiar with different methods of analysis

-Apply theoretical knowledge in a professional context

METHODOLOGY

The student is responsible for carrying out the curricular internship according to the rules laid out in the Educational Cooperation Agreement, and in accordance with the general policies of IE University and of the collaborating organization, including but not limited to all policies related to respect and confidentiality.

At the beginning of the internship, the student will join the collaborating organization at the agreed upon date. Thereafter, he or she will comply with the agreed upon schedule, in accordance with the attendance policy established in the Educational Cooperation Agreement.

The collaborating organization will assign a professional tutor who will be responsible for supporting, supervising, and evaluating the student in the professional context throughout the internship. The professional tutor will provide assistance to the student to resolve issues of a professional nature that are relevant to the fulfillment of the internship.

IE University will assign an academic tutor to provide academic support for the student over the course of the internship. The professional tutor and the academic tutor will coordinate the activities established in the Educational Cooperation Agreement, including any necessary adjustments.

Throughout the internship, the student will maintain contact with the academic tutor according to the procedure proposed by the tutor at the beginning of the internship and will communicate any issues that might arise during the internship.

The student's performance and development in the internship will be evaluated through a final evaluation report completed by the professional tutor, as well as a midterm essay and a final reflective essay graded by the academic tutor. The number of hours dedicated to the different activities below will depend on whether the student is doing the internship for 6, 2, 5, or credits.

Please consult the Additional Documentation section of your online Campus to take a look at the expected distribution of your workload during your internship.

Teaching methodology	Weighting	Estimated time a student should dedicate to prepare for and participate in
Lectures	0.0%	0 hours
Discussions	0.0%	0 hours
Exercises	0.0%	0 hours
Group work	0.0%	0 hours
Other individual studying	0.0%	0 hours
TOTAL	0.0%	450 hours

PROGRAM

SESSION 1
SESSION 2
SESSION 3
SESSION 4
SESSION 5
SESSION 6
SESSION 7
SESSION 8
SESSION 9

SESSION 10

SESSION 11

SESSION 12

SESSION 13

SESSION 14

SESSION 83

SESSION 84

SESSION 85

SESSION 86

SESSION 87

SESSION 88

SESSION 89

SESSION 90

EVALUATION CRITERIA

0% -Midterm Reflection Essay.

The Midterm questionary is a touchpoint that confirms that the first half of the internships is following the contract details. As such it should cover answer the following:

■   Why did you choose this internship?

■   What were your expectations prior to beginning the internship? In what ways has your experience aligned with or diverged from those expectations?

■   What have you learned so far and what challenges have you faced?

■   How can you apply specific concepts and skills from your course work to what you are experiencing during the internship?

■   What are your goals for the remainder of the internship?

50% -Final Reflection Essay. An 8-10page 12-pt font double-spaced analytical reflection evaluated by the academic tutor.

The Final Reflection Essay picks the Midterm structure asking the student to reflect on their growth and experiences for at least 8 pages report and on their experience in the internship overall. As such it should cover answer the following:

■   What additional skills or knowledge did you develop in this internship since you wrote the midterm essay?

■   In what ways apart from those discussed in the previous essay can you apply specific concepts and skills from your course work to what you are experiencing the internship?

■   What were some of the challenges that you came across in the internship? How did you address them and what did you learn in the process?

■   How do you think your experience in this internship will affect your future professional or academic path?

■   Overall, how would you change your experience and how were you changed by it?

50% -Professional Evaluation. A report providing an overall evaluation of the student's work performance by the professional tutor.

Obtaining a "Fail" grade.

The academic tutor may give the student a failing grade in the ordinary call in the following cases:

1 If the final essay does not meet the minimum requirements or if the evaluation of the collaborating organization does not justify a passing grade.

2 If the student fails to deliver the midterm and or final essays or any other documentation required by the academic tutor on time and under the conditions specified without a justified cause.

3 If the student fails to show up for work the minimum of hours agreed with the professional tutor or to deliver the scheduled essays by the agreed deadlines. If the student cannot fulfill the agreed

upon schedule because of illness and/or IE policy for justified absences such absences must be justified with proper documentation to both professional and academic tutors.

4 Furthermore, students will receive a failing grade if they fail to meet their agreed-upon obligations with the collaborating institution including but not limited to those regarding attendance schedule responsibilities confidentiality or other internal rules.

Students will fail their corresponding credit load in the following cases:

■ The student is made redundant by the collaborating institution due to breach of contractual obligations.

■ The student decides to end their internship before the completion date specified in the Agreement o prior to fulfilling the number of hours needed to receive the corresponding credits. It is of foremost importance that any issues faced by the student be communicated to the Professional Tutor prior to student's informing the collaborating institution of their desire to resign.

■ The student fails to start a previously confirmed mandatory curricular internship.

Criteria	Percentage	Comments
Individual Work	0%	Midterm Reflection Essay
Final Exam	0%	Final Reflection Essay
Other	0%	Professional Evaluation

PROFESSOR BIO

ANDREW BERTOLI

Andrew Bertoli is an assistant professor at IE University. His research explores such topics as how sports influence world politics, which types of leaders are the greatest threats to international stability, and the role that the internet has played in intensifying ideological conflicts. Prior to coming to IE, Andrew received a Ph.D. in political science and an M.A. in statistics from UC Berkeley, where he also taught courses on international security and research methods.

Professor ANDREW BERTOLI

E-mail abertoli@faculty.ie.edu

OTHER INFORMATION

If you wish to contact me or arrange a meeting use my email address abertoli@faculty.ie.edu