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**HEPTech nodes` needs and skills
survey**

**Eleonora Getsova,
Scientific Research Centre,
Sofia University**

CONTENT

- Aggregated outcomes of the survey along with conclusions in the following areas:

Scope of work, activities/services

Resources

Financing

Staffing

IP issues

Start-ups issues

Marketing

Contacts with Industry

Awareness raising and communications

Events

Results of the TTOs' activities

Needs: Demand-Support

- Recommendations

INTRODUCTION

HEPTech is the high energy physics technology transfer network (TTN) of CERN. Consisting of 21 TTOs and created in 2008. Bringing together leading European high energy physics research institutions, it provides academics and industry with a single point of unrivalled access to the unique skills, capabilities, technologies and R&D opportunities of the high energy physics community in a highly collaborative open-science environment.

INTRODUCTION (2)

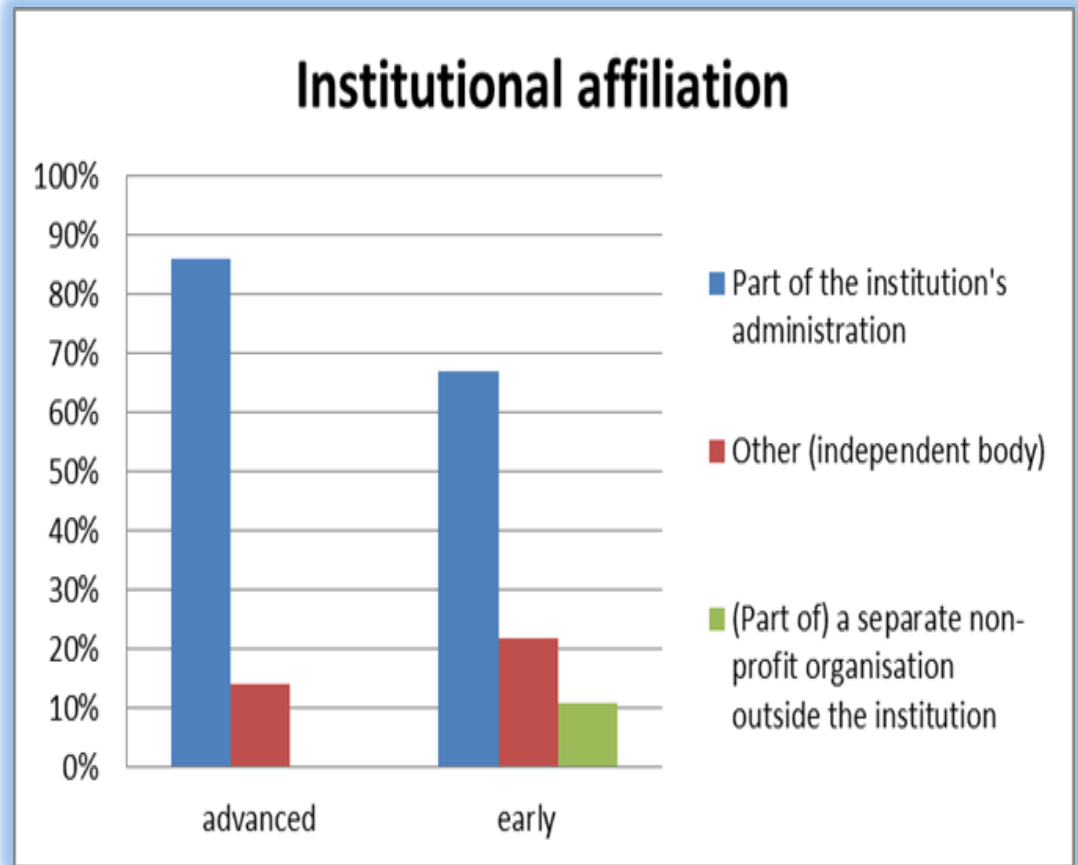
- Aim: to identify the skills of the nodes and areas where they need support through the network
- The HEP Tech nodes' skills survey covered 7 advanced and 9 early stage TTOs
- Analysis was made on the basis of comparison between the advanced and early stage TTOs

ADMINISTRATIVE ISSUES

The survey covered a total of 16 TTOs.

12 out of them (75%) are part of the administration of the institution to which they are affiliated.

This determines their profile and competence and the overall profile of their employees.

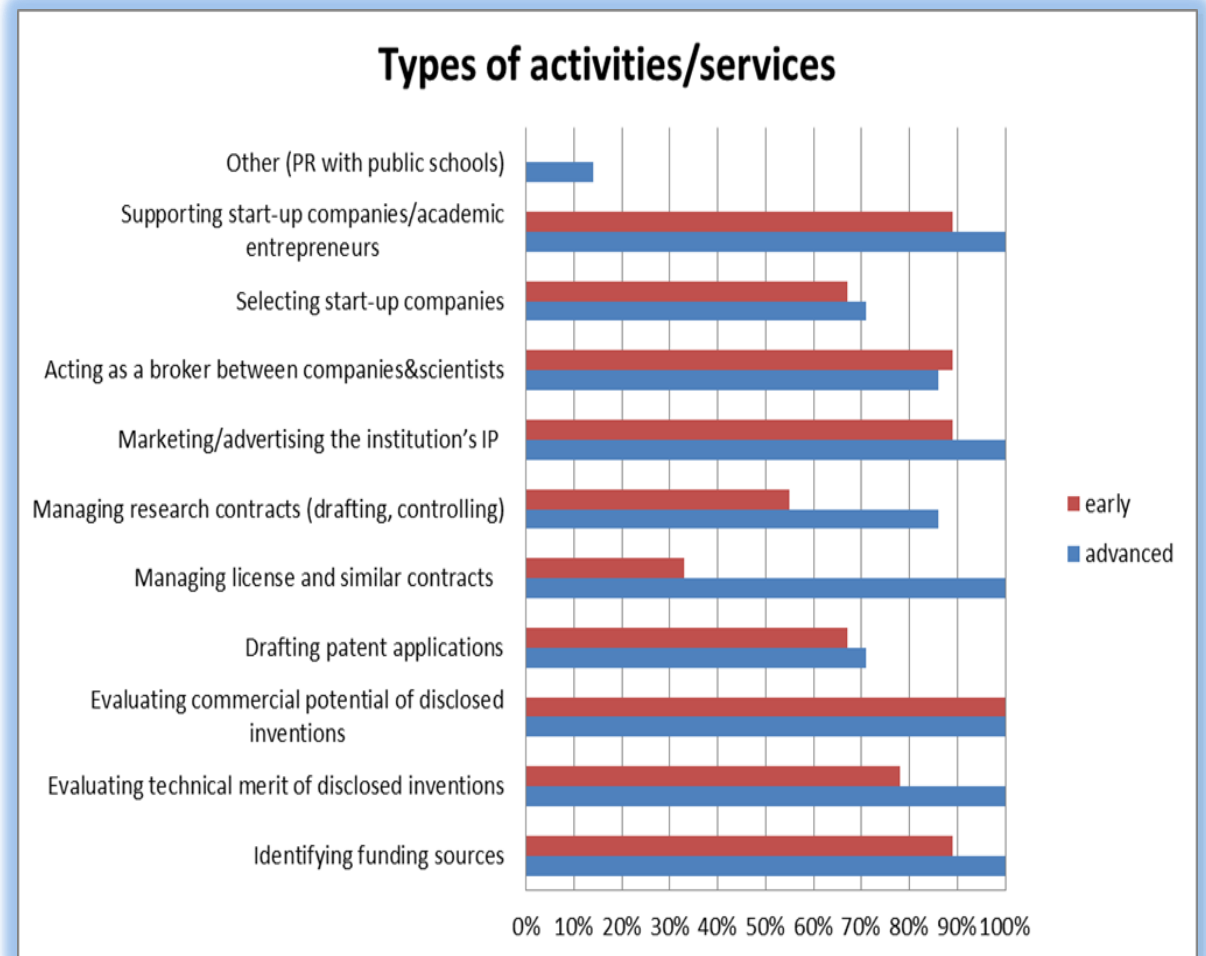


ACTIVITIES/SERVICES

All TTOs perform/
provide a whole range of
activities/services.

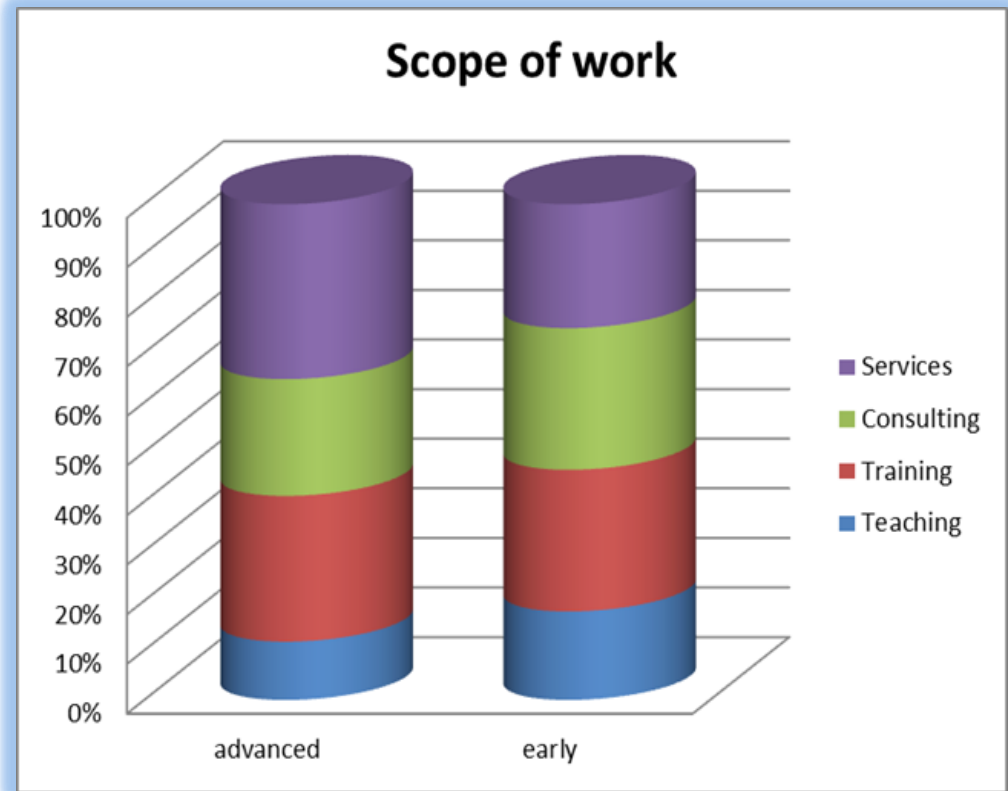
Major and minor
differences: in Managing
license and similar
contracts and in
Managing research
contracts advanced are
more active.

Reason: lack of sufficient
capacity and adequate
resources of the early
TTOs to perform such
activities. Training.



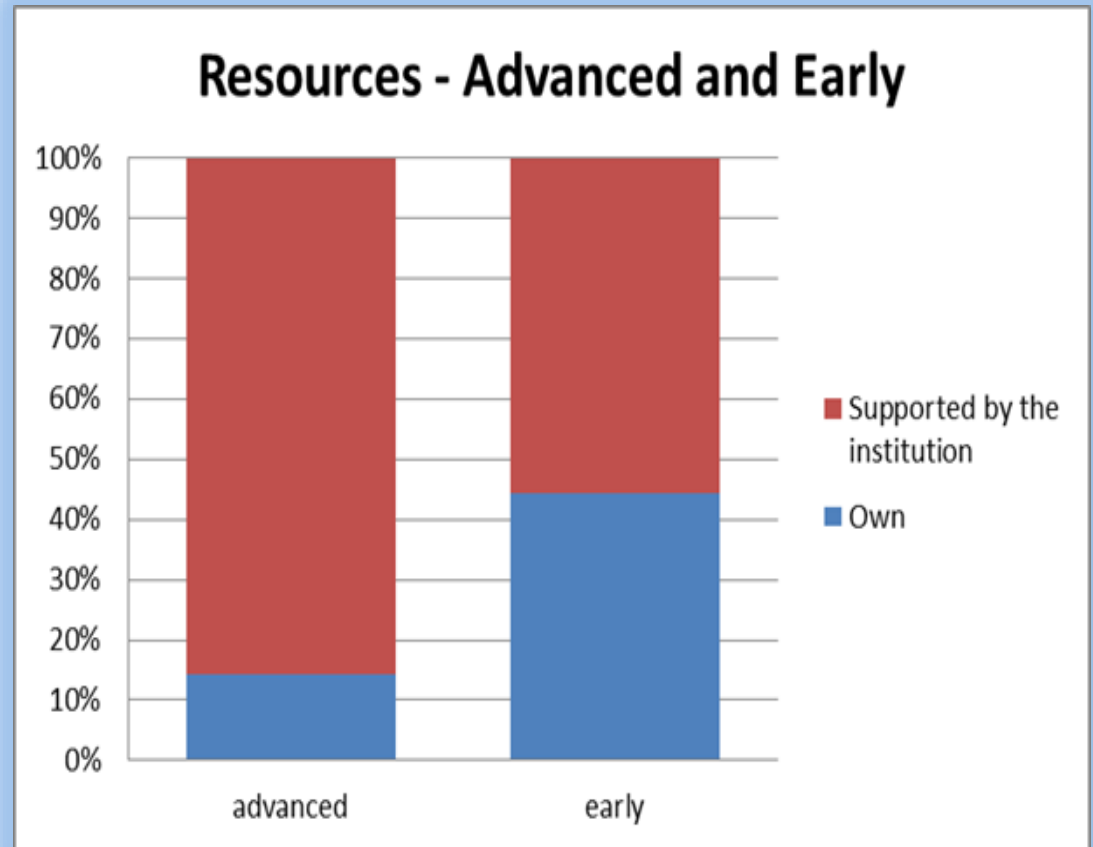
SCOPE OF WORK

Over the process of gaining experience the TTOs tend to provide more Services which leave behind Consulting while provision of entrepreneurial Training remains an important activity area.



RESOURCES

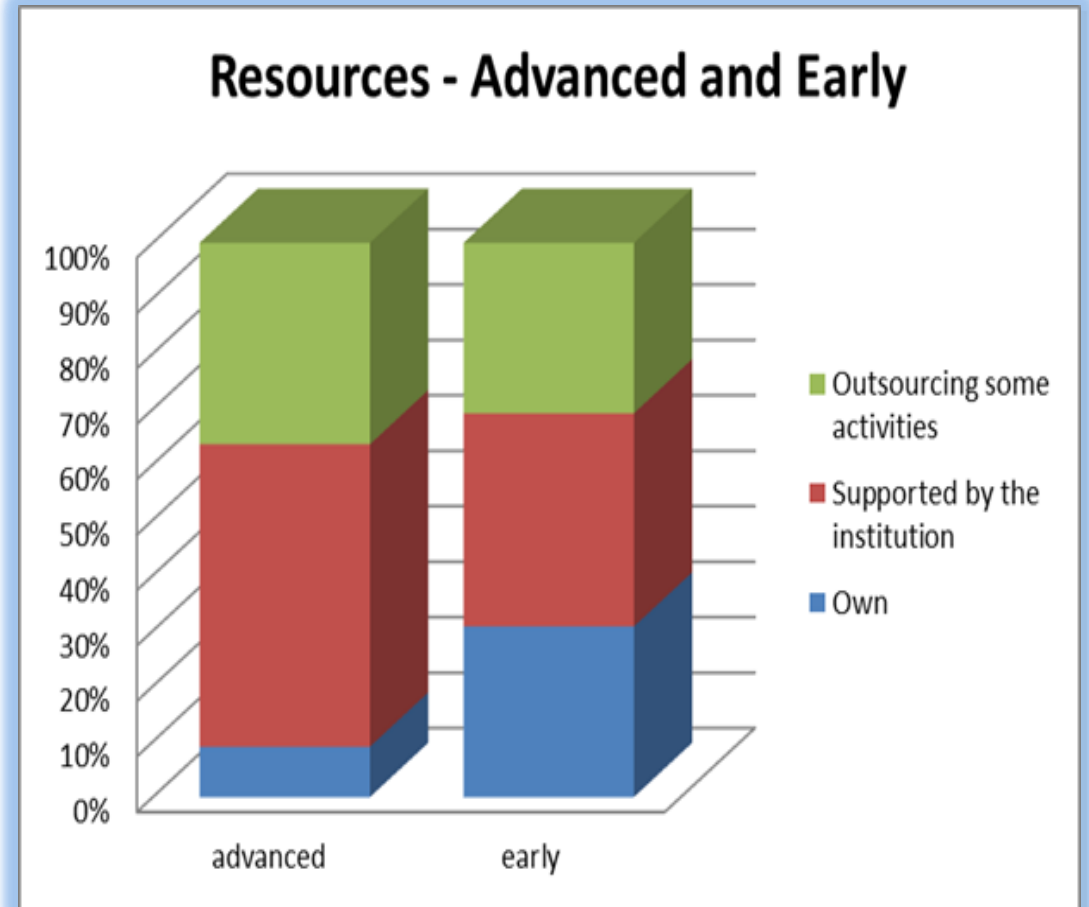
Being part of the parent institution's administrations, for both types of TTOs the institutional support in terms of resources – human, technical, logistic, information and financial - is essential for their functioning.



RESOURCES - OUTSOURCING

Both types TTOs outsource about one-third of their activities in specific areas such as IP and patent attorney services, patent drafting and filing, prosecuting patent applications, drafting and controlling license and similar contracts, some marketing activities

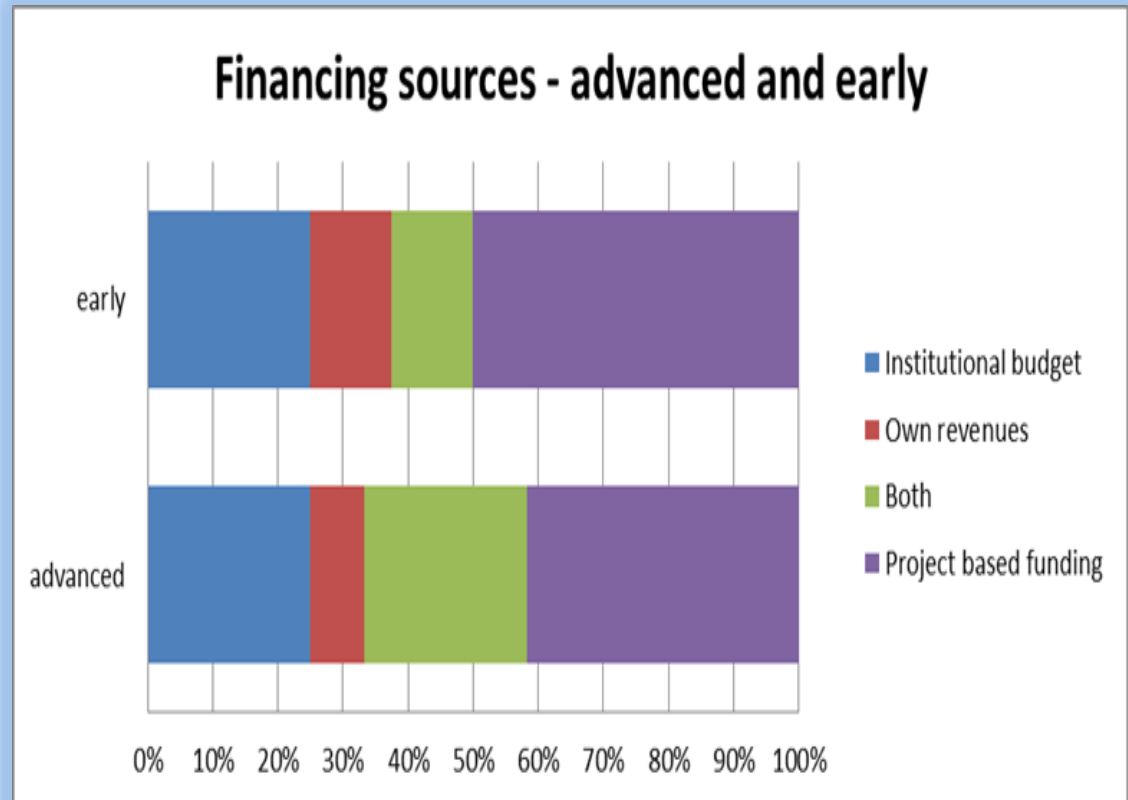
The early TTOs rely more on their own resources so they need support in improving their infrastructure and in developing specific marketing and TT skills of their staff.



RESOURCES - FINANCING

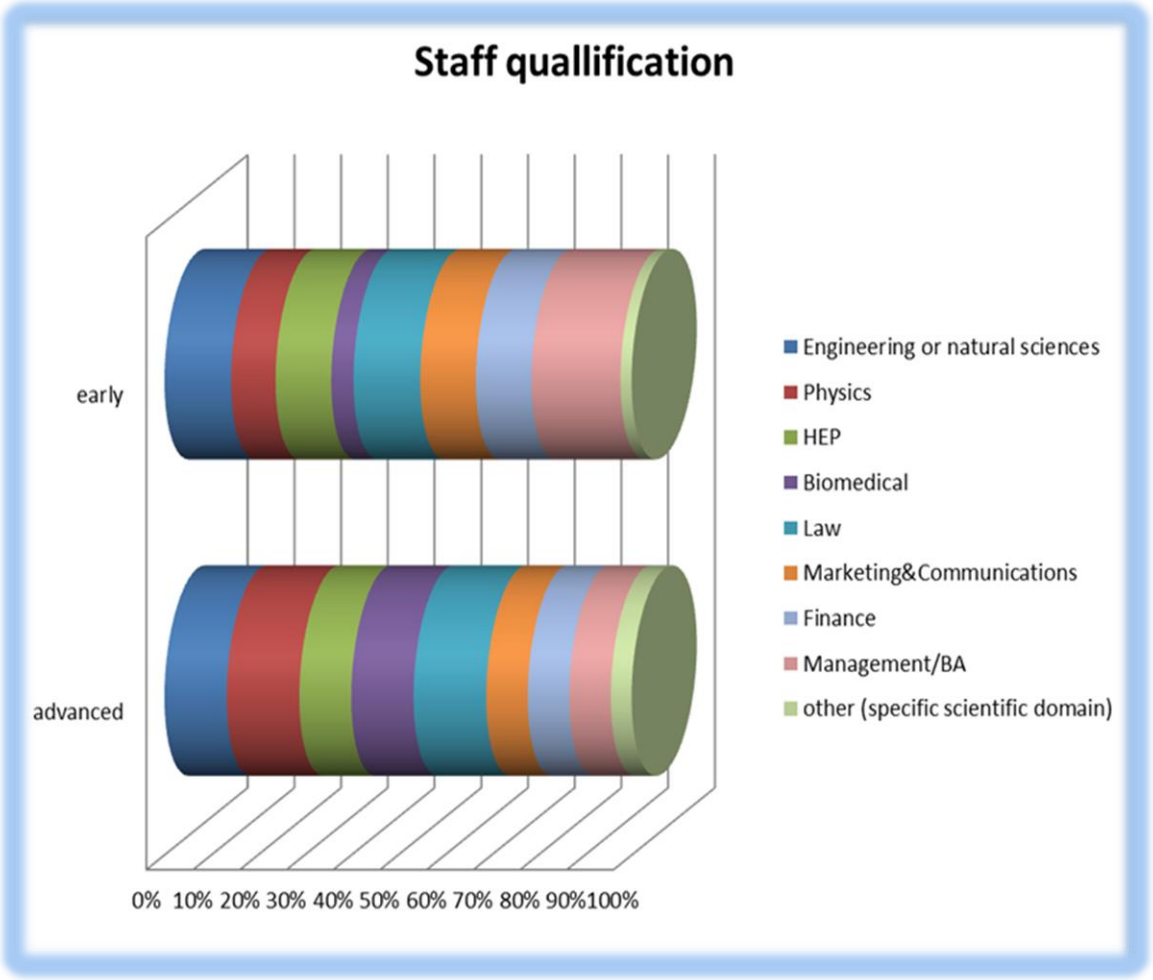
Project-based funding takes a significant share in the overall financial resources of both types of TTOs – for both activity (available at European level) and operations (national and regional funds).

TTOs need support in developing and improving their ability to attract and manage financial resources and information about funding sources at European level.



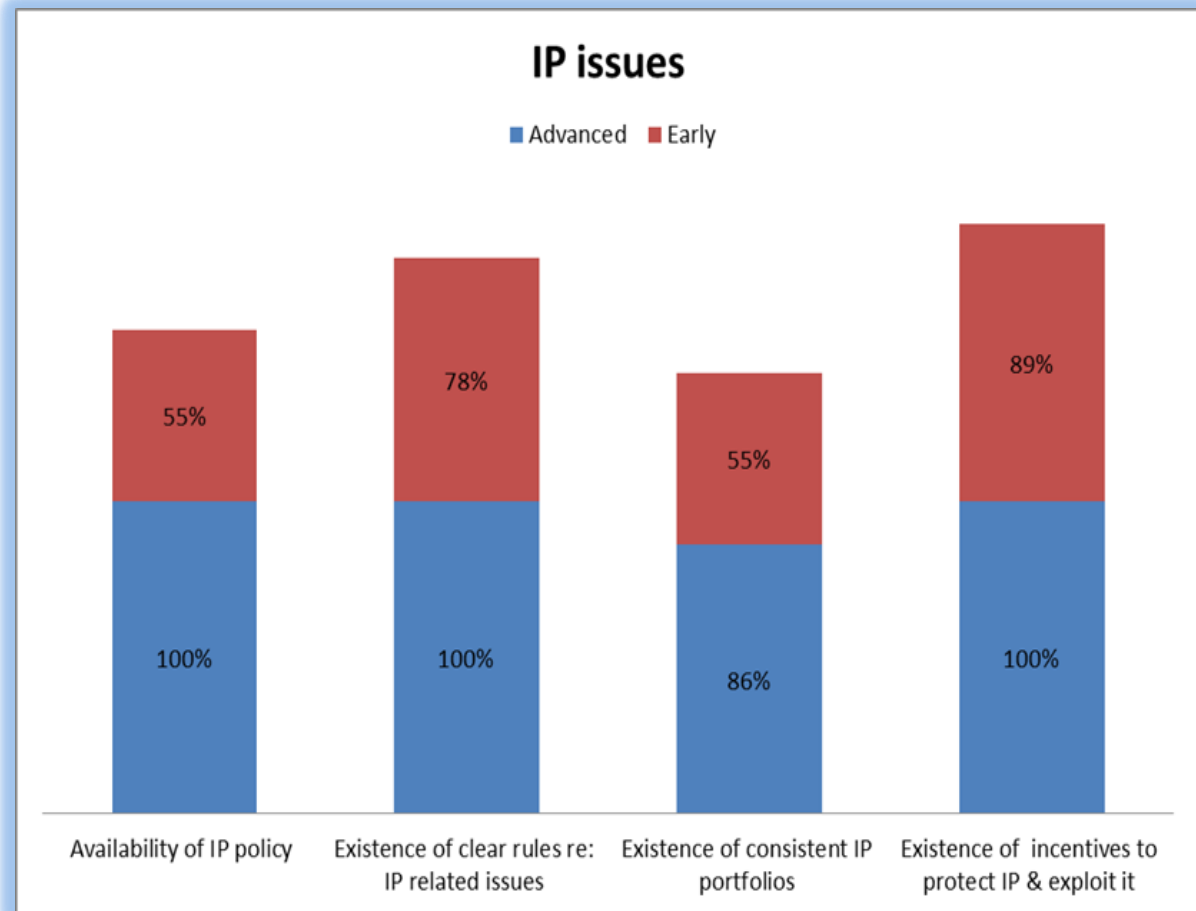
STAFFING

The wide range of staff qualifications at the early TTOs is a prerequisite for building adequate capacity and potential ability to perform a wide range of activities in the field of knowledge and technology transfer, IP, patent and licensing.



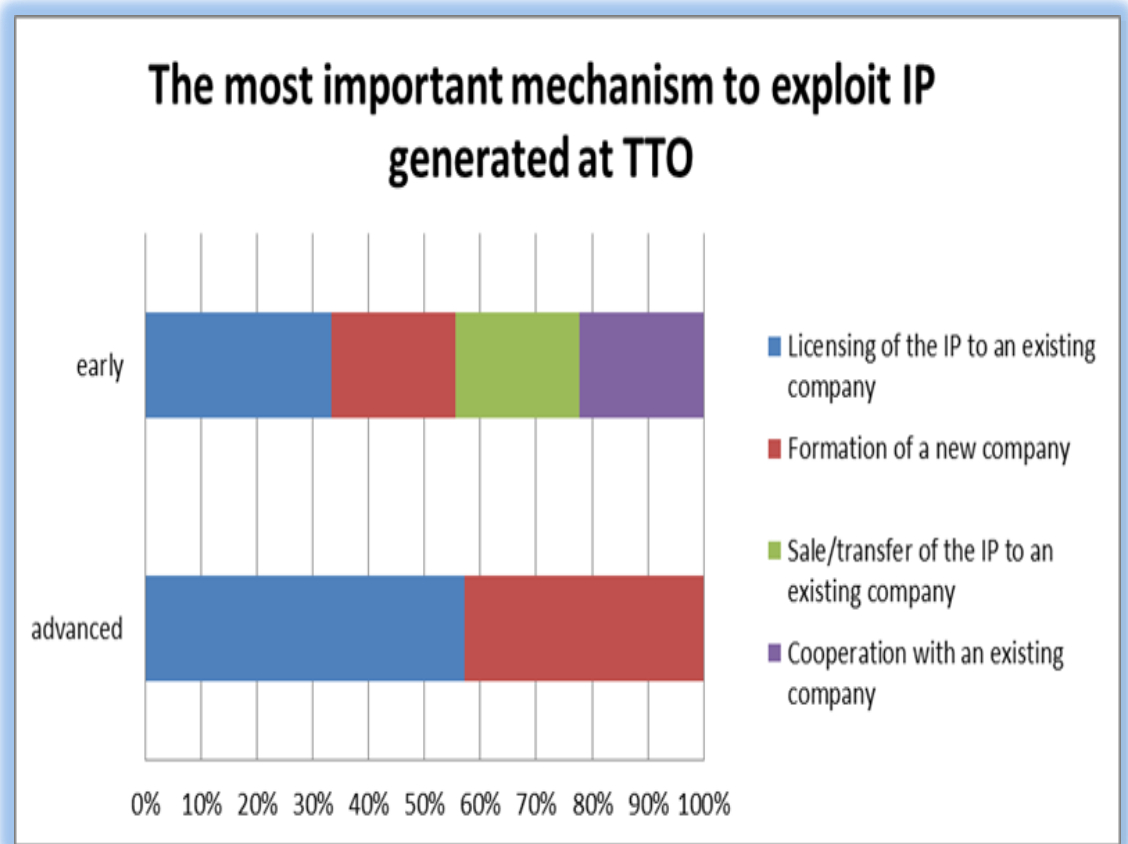
IP ISSUES

All the TTOs that have IP policies are in fact applying the IP policies of their parent institution as they are part of its administrative structure.



IP ISSUES (2)

Licensing of the IP to an existing company and Formation of a new company are the most frequently implemented mechanisms and it might be worth exploring them as good practice and case studies.



IP ISSUES (3)- LICENSING

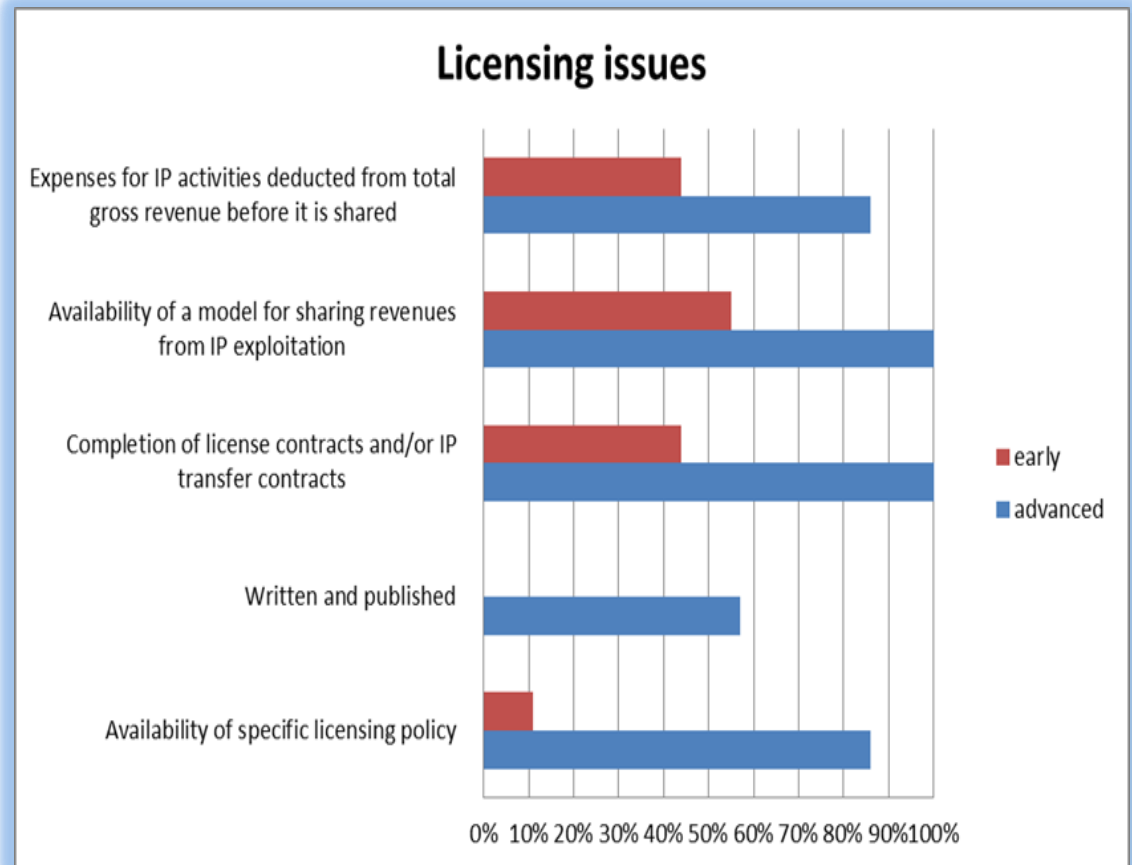
Significant differences:

Almost all advanced have specific licensing policies BUT just one early has such and it is neither written nor published.

Less than 50% of the early TTOs are involved with completion of license and/or IP transfer contracts (compared to 100% of the advanced).

Most of the early TTOs do not have models for sharing revenue from IP.

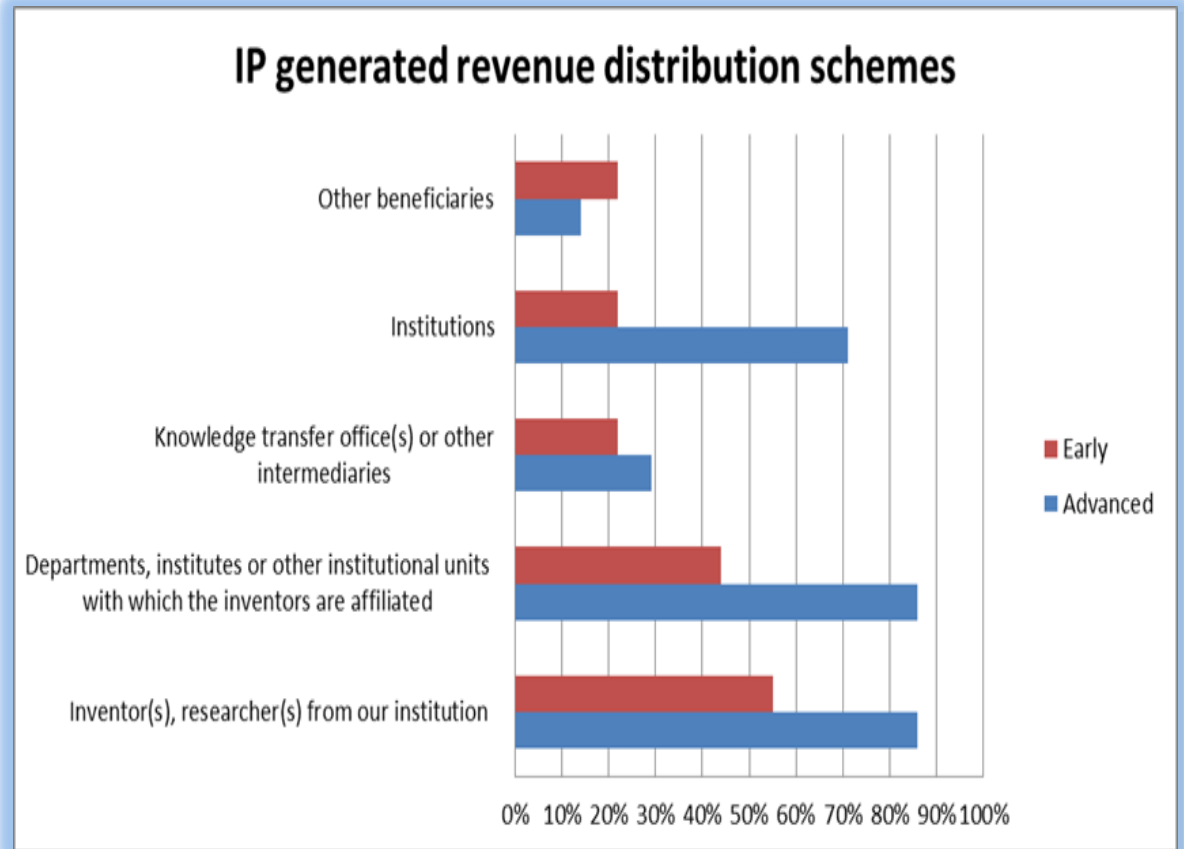
The early nodes need support to develop their licensing policies (specific training and good practice exchange).



IP ISSUES (4)

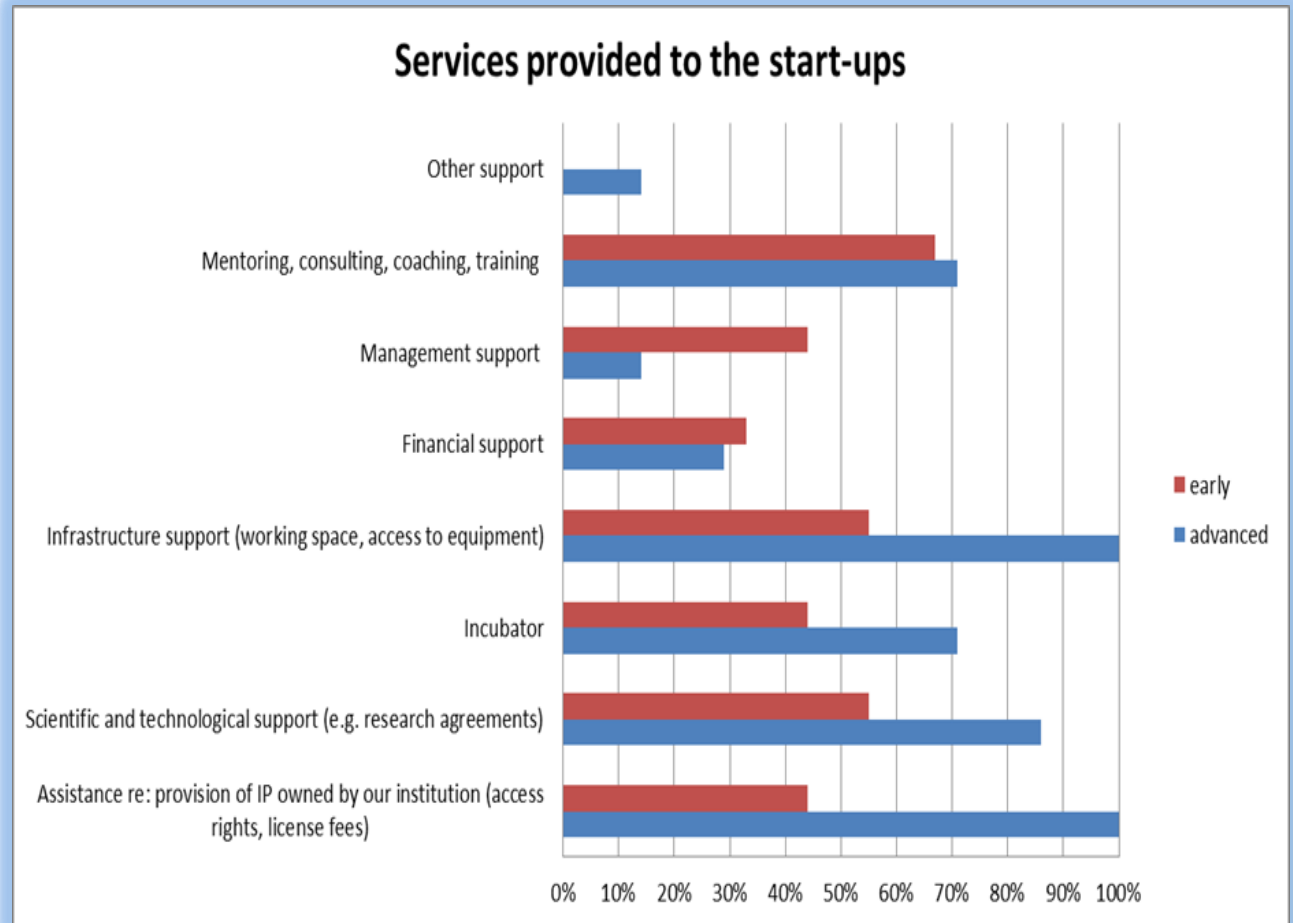
Three main actors in the IP generated revenues distribution scheme: the Inventors, the Institutional units/departments with which the inventors are affiliated, and the Institutions and they are the main beneficiaries.

The more support the TTOs receive from the Institution the higher the returns.



START-UPS

The TTOs shift from providing mentoring, consulting, management and financial support to the start-ups to assistance in the IP area and infrastructure support.

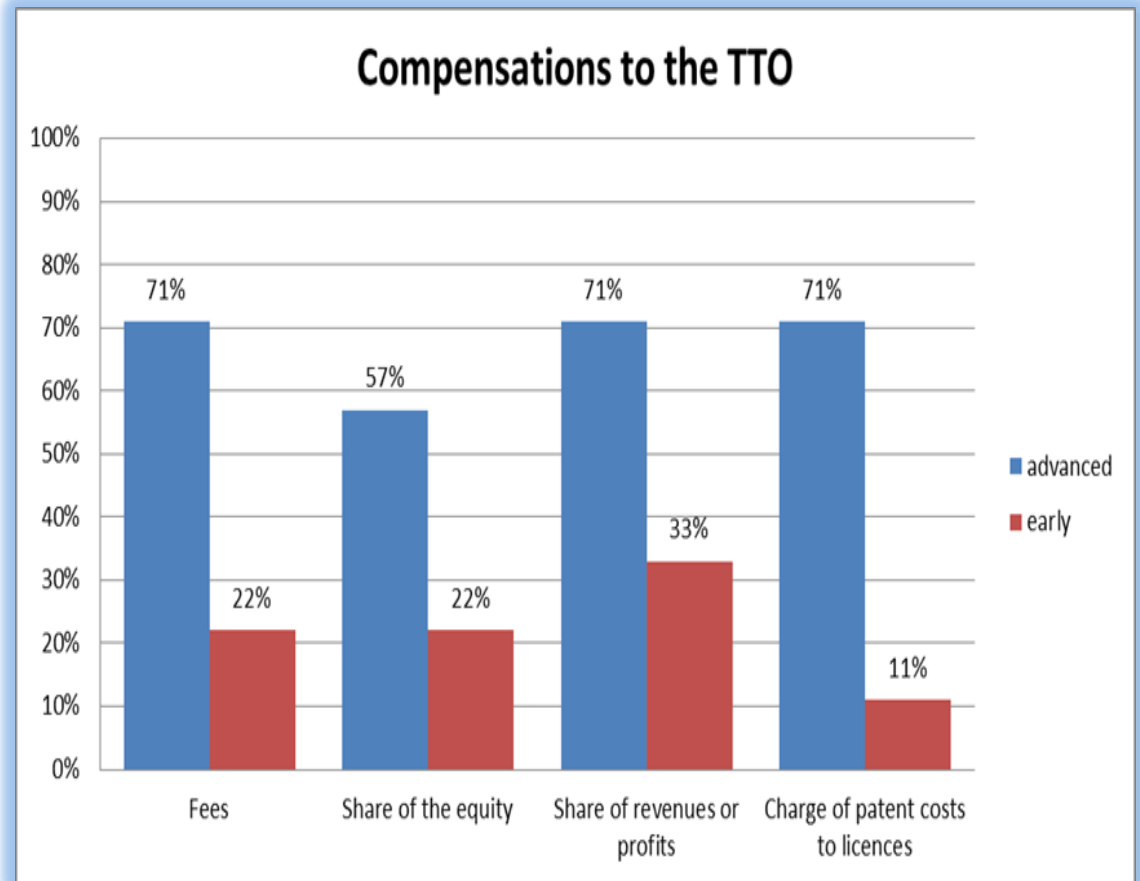


START-UPS (2)

The compensations to the TTOs are reciprocal to the types of services provided.

To be able to provide more marketable services, the early TTOs need support to develop their capacity in the IP area.

Early stage TTOs need support to elaborate and establish working start-ups related policies.



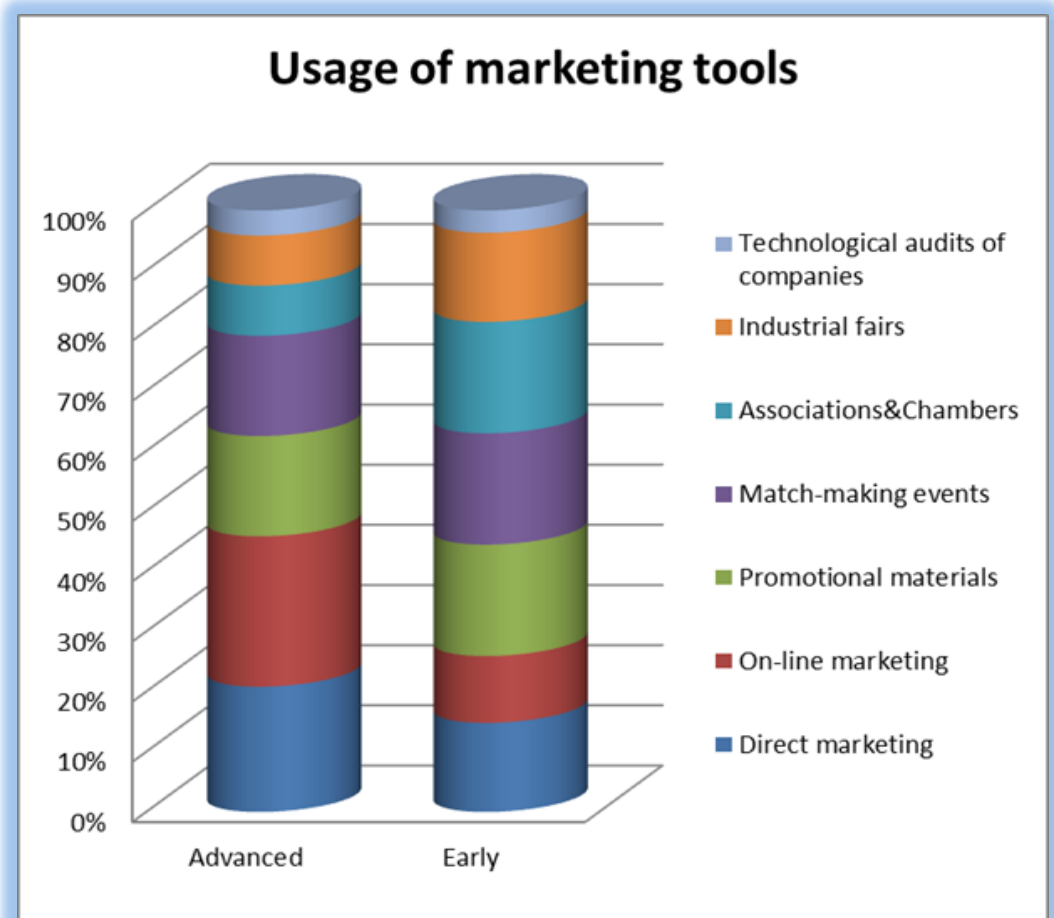
MARKETING

Advanced TTOs use mostly on-line and direct marketing.

Early TTOs are still in the process of identifying their target audiences so they use associations and chambers as intermediaries.

Promotional materials and match-making events remain powerful marketing tools for both types of TTOs.

There is no single universal tool and to approach the target audience a variety of marketing tools is used.

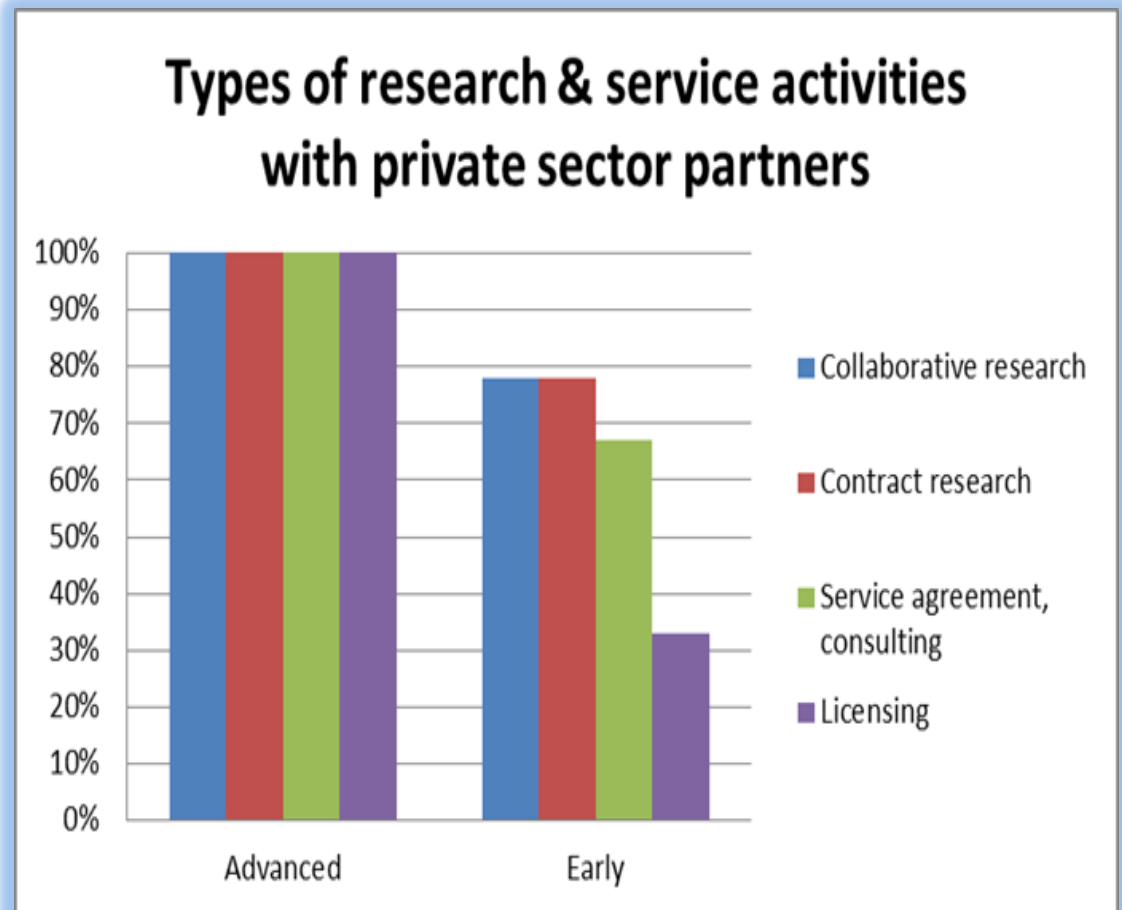


CONTACTS WITH INDUSTRY

The role of the HEP Tech: training and consulting to the early TTOs to enable them to develop marketable services by capacity building in IP management, licensing, etc.

Best practice sharing and appropriate information exchange within the network could facilitate the contacts with industry.

Transnational match-making events could also contribute in this direction.

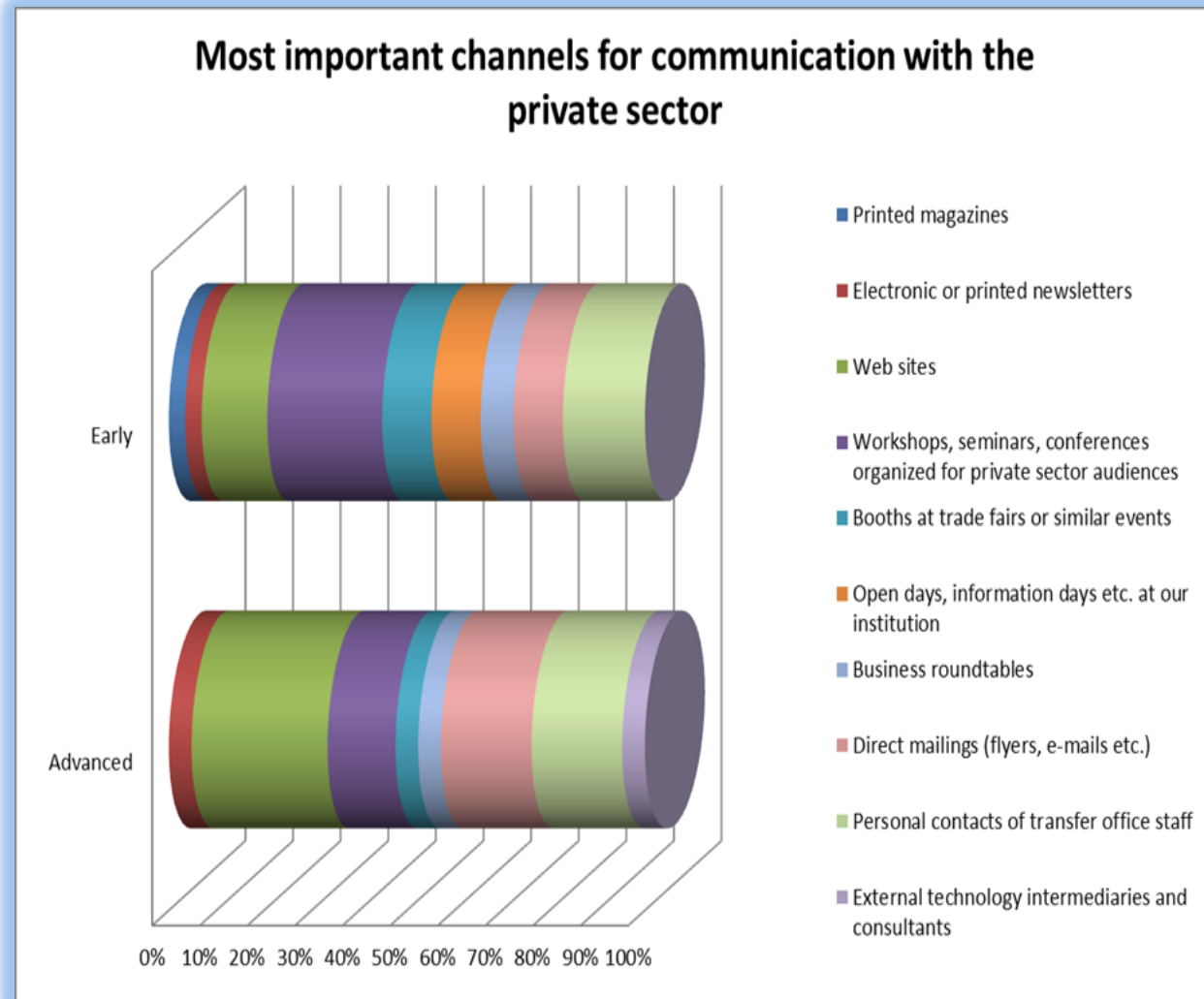


COMMUNICATION CHANNELS

Greater variety of personalized communication channels – to identify target audiences.

Later, the electronic communication channels step in along with the personal contacts of the TT office staff.

The early TTOs have to identify their target audiences and to select the most appropriate and cost-effective channels.

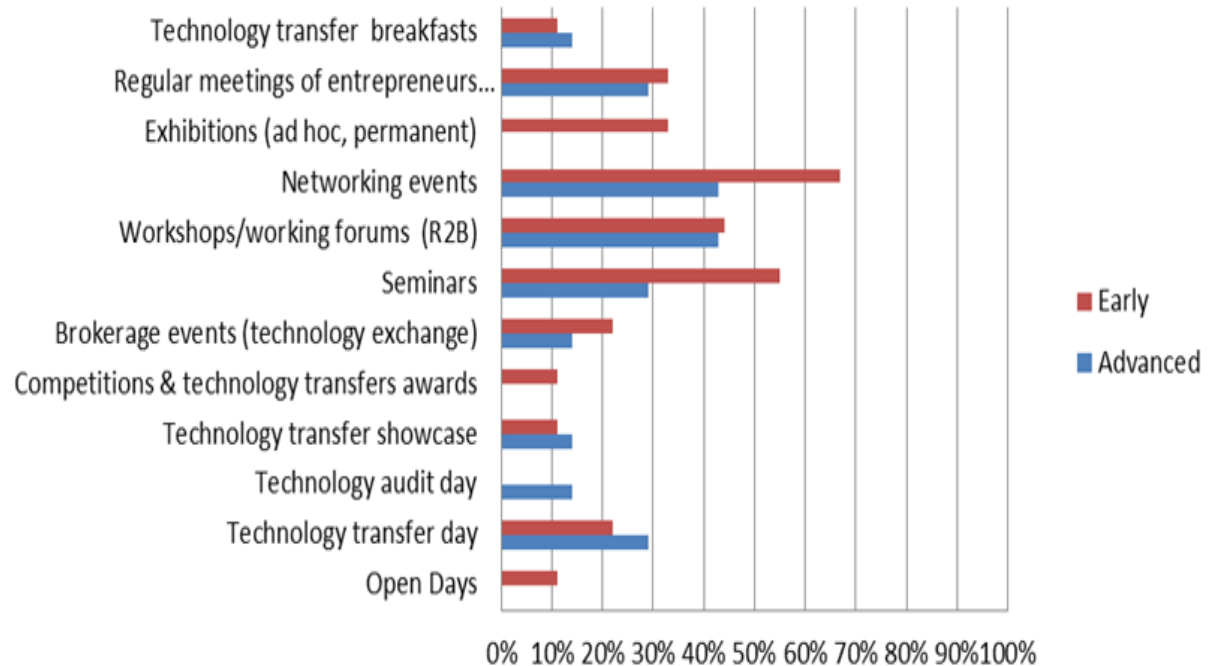


ORGANISATION OF EVENTS

Early TTOs looking for more visibility are more active in organising events. Many receive project funding covering promotional events.

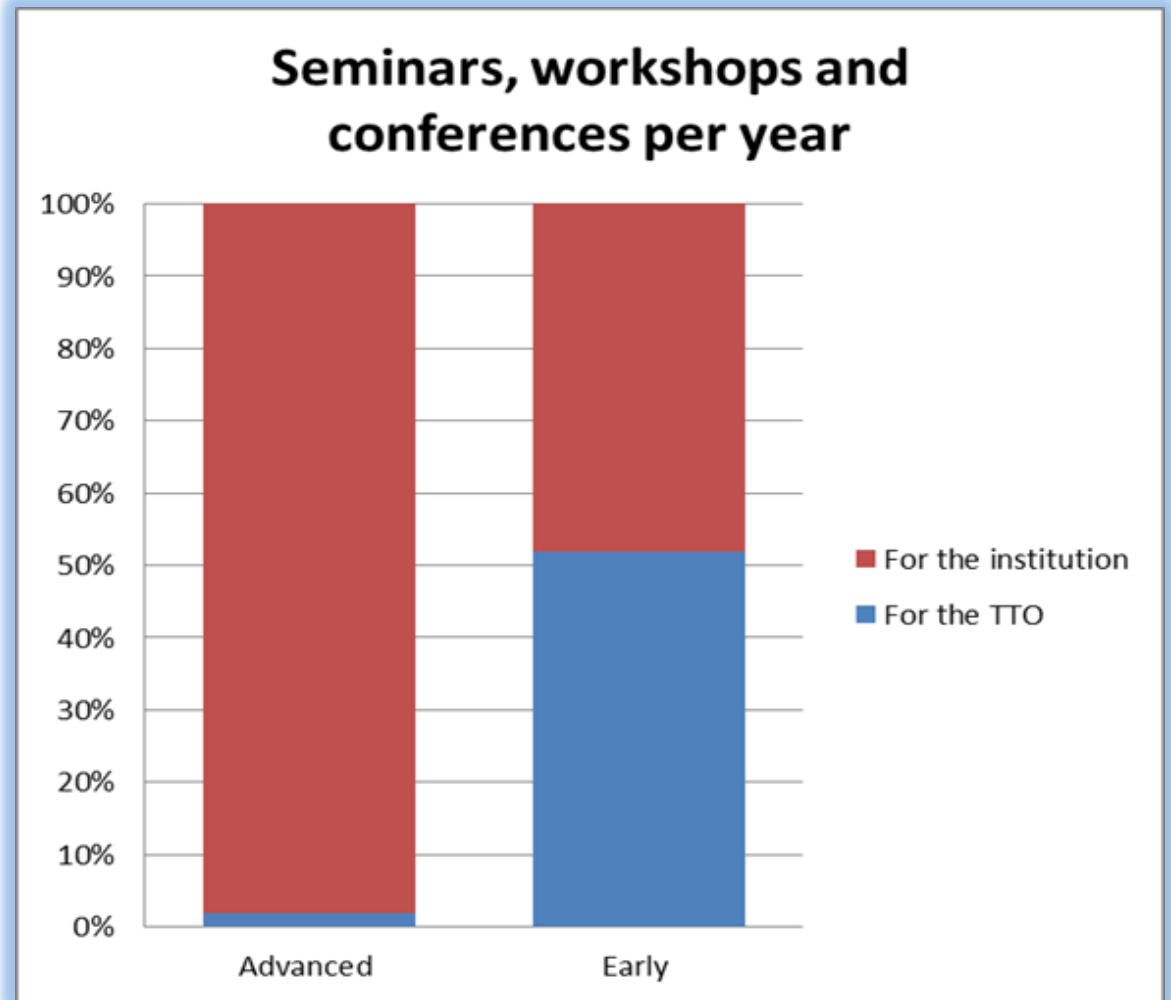
The advanced are well established in the market and focused on the most purposeful and necessary types of events.

Most frequent types of events organised by the TTOs on annual basis



ORGANISATION OF EVENTS (2)

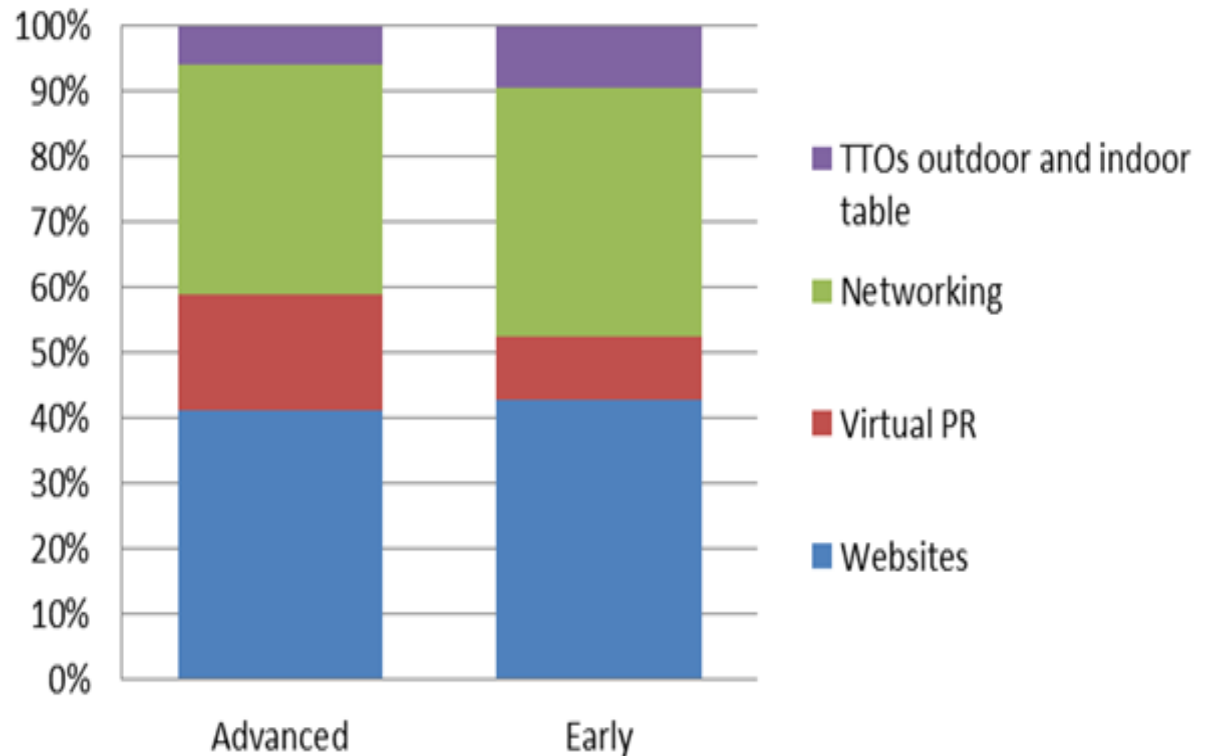
The advanced TTOs are more focused on their specific tasks while the parent institution has taken the responsibility for organization of seminars and conferences.



TOOLS FOR PROMOTION

Websites and web-based promotional materials are generally preferred for promotion of the TTOs as they are as powerful as cost-efficient.

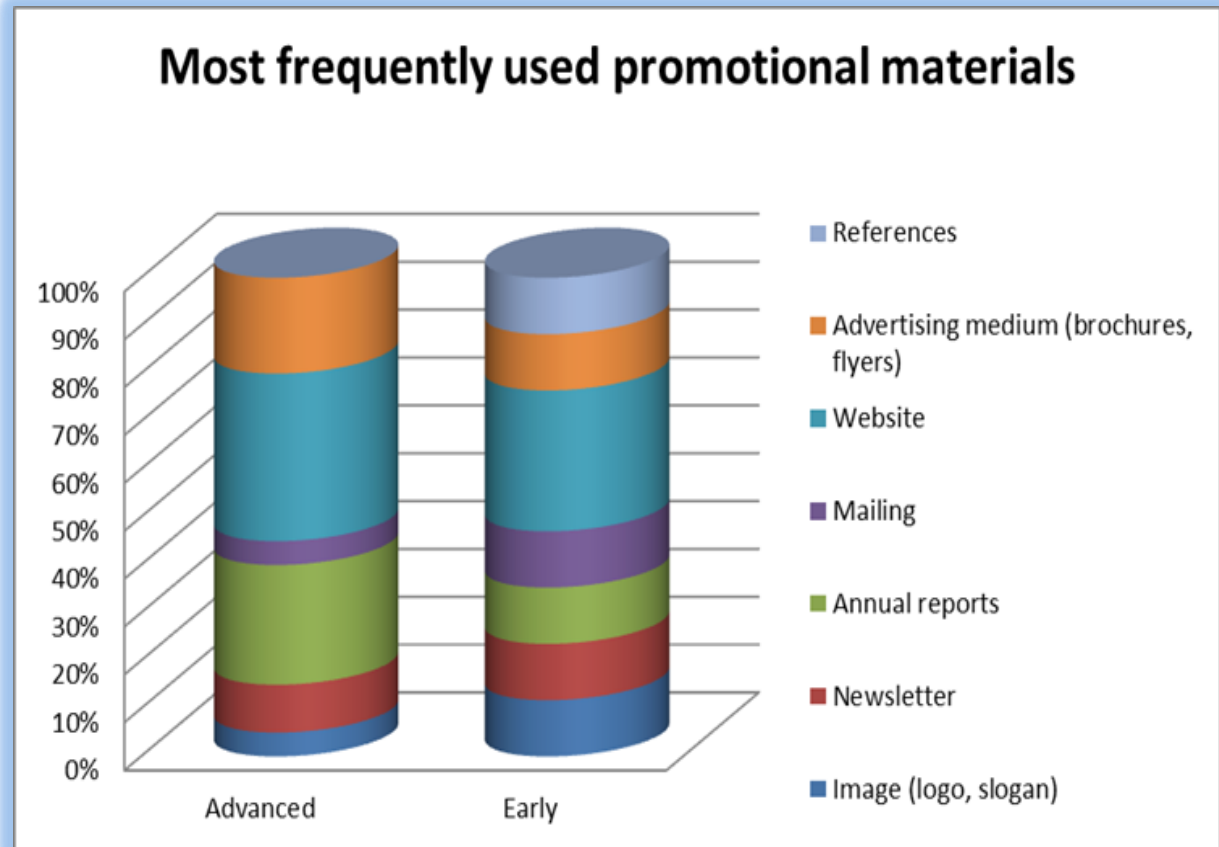
Basic tools for promotion of the TTO



PROMOTIONAL MATERIALS

Larger diversification for the early TTOs – due to the great variety of communication channels and events used by them for promotional purposes. Production of such materials very often is an obligation of the TTOs within the framework of externally funded projects.

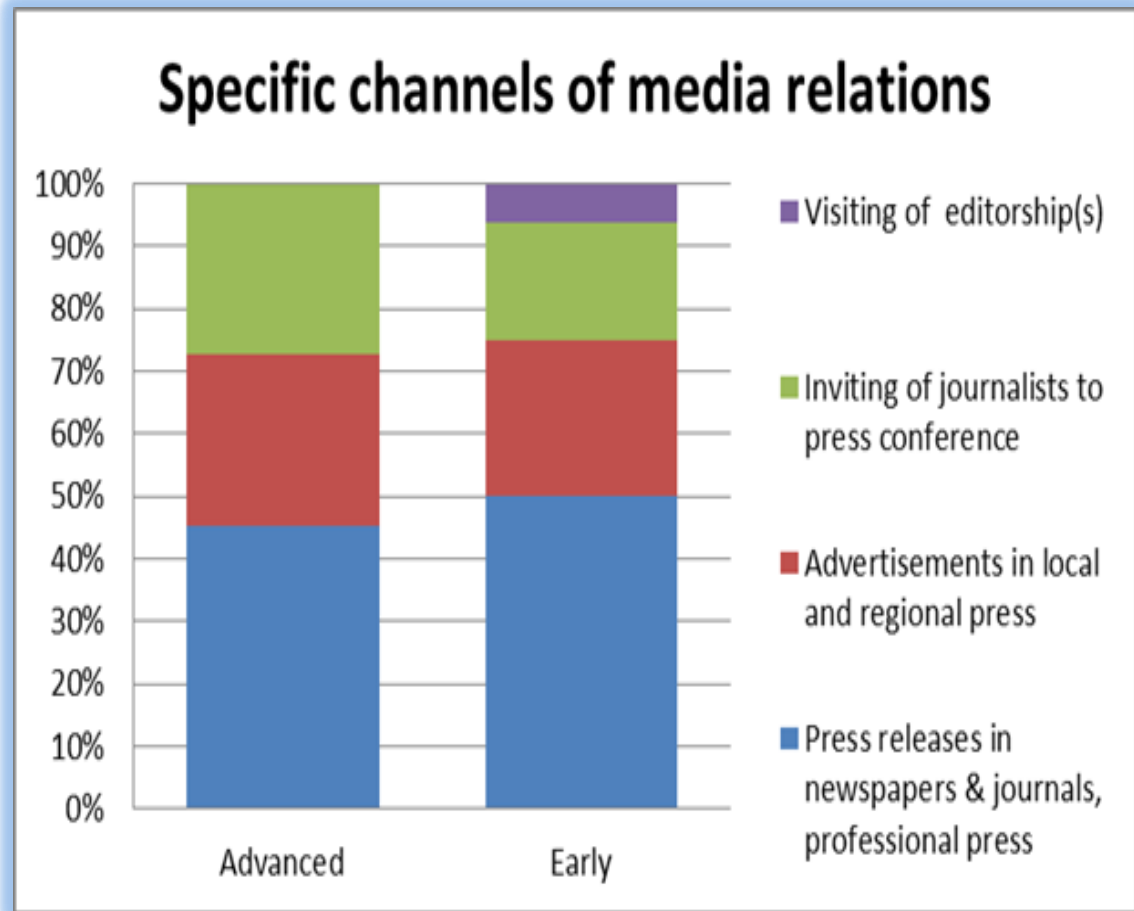
Web-based materials are the common favourite.



MEDIA RELATIONS

Almost equal distribution of the channels of media relations and their relative weight for both TTOs.

Press releases take the largest possible share for both, followed by advertisements in local and regional press and by press conferences.



AWARENESS RAISING & COMMUNICATIONS: SUMMARY OF THE CONCLUSIONS

- To become visible and recognizable by industry and relevant stakeholders the early TTOs use a wide range of channels, tools and means of communication, organize and participate in various events and produce a large spectrum of promotional materials. Sometimes these activities are funded by projects.
- The advanced TTOs are already well established in the market and are focused on web based channels, tools and means of communication - powerful and cost-efficient.
- Irrespective of their steady preferences, the advanced nodes are not restricted to a single channel, tool or means of communication and have achieved appropriate diversification that allows them to keep their positions in the market.

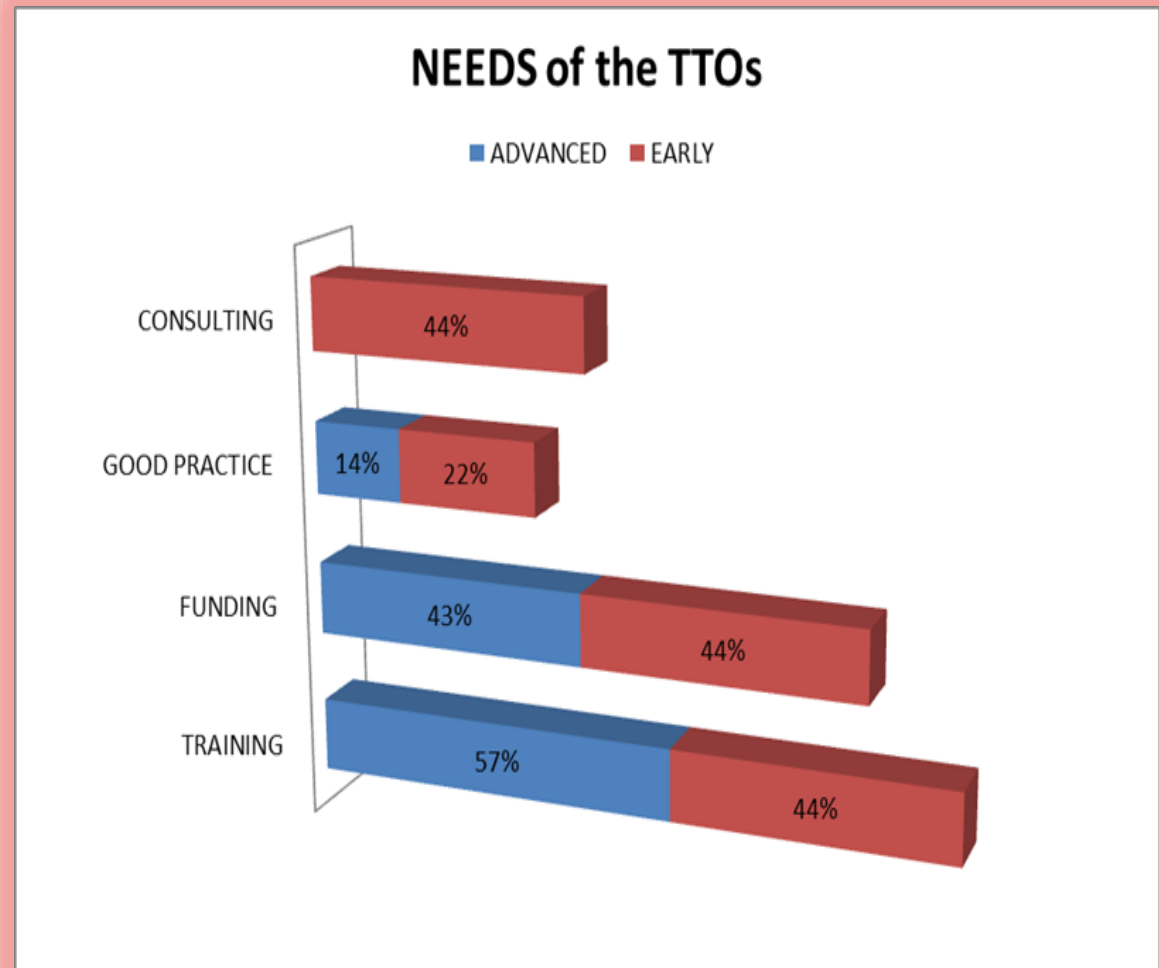
NEEDS: DEMAND-SUPPORT (3)

Training – basic (Business skills, Presentation skills for the academics, Project applications and overall training of the staff in all the functional areas of the TTO) and specialized (TT marketing, licensing, negotiation tactics, IPR legal support);

Funding (for spin-out companies, for new TT offices);

Best practice exchange – in provision of incubation space and infrastructure for start-ups, internal cooperation with researchers and incentives, in contacts with industry for TT;

Consulting – only for early - for contacts with industry for TT and meeting industry needs.



RECOMMENDATIONS

The nodes need support in:

- IP management
- Licensing
- Start-up related policies
- Marketing
- Training
- Good practice sharing
- Finding and exploiting external funding opportunities
- Consulting (only for the early stage TTOs)

THANK YOU VERY MUCH!