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**NEW**

**NEM**

**NEW**

**Survey feedback**

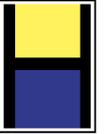
**International Cooperation Strategy  
NEM Members' Interests**

Hadmut Holken, Holken Consultants & Partners

With support from Pierre-Yves Danet, Orange, and Roger Torrenti, Sigma Orionis

NEM GA, Brussels, 1 April 2014



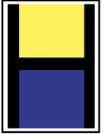


# Objectives / Methodology

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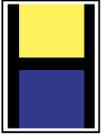
- Define the NEM strategy for international cooperation on behalf of a consultation of NEM members' interests;
- A short online survey;
- 4 qualitative questions:
  - ▶ **Are you interested in international cooperation** (with extra-European countries/regions in the world)? Yes/No - Why?
  - ▶ **Do you have priority countries / regions?** If so, please list them and explain why these countries / regions.
  - ▶ How could **NEM** support your international strategy?
  - ▶ How could **you** contribute to NEM's international strategy?
- Outputs for discussion, strategic decisions and actions

# 1. Are you interested in international cooperation?



Total responses	Yes	No	Usable responses	Transparent responses
40	39	1	38	36 (identified themselves)
100%	97,5%	2,5%	95%	90 %

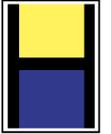
- The NEM community is interested and concerned
- Willing to help



## 2. Respondents' Profiles

Type of structure	#
SME +	10
Research Institutes (of which 2 cultural)	7
Academia	6
Big Companies	5
Non profit organisations 1 telecom, 1 international, 1 standardization, 1 content)	4
Clusters	3
Non identified, NC	3
Consulting	1
Total	39

- Stakeholders are widespread throughout Europe



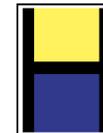
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Question 1

# **Why respondents are interested in international cooperation?**

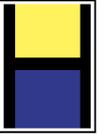
**(with extra-european countries/regions in the world)**

## Economically driven and Strategic interest (R&D/innovation)



<b>Interest in int'l cooperation</b>	<b># responses (multiple answers)</b>	<b>% of total resp.</b>
<b>1/ Business development / Market diversification / Global take-up of products and services</b>	20	47,6 %
2/ Knowledge transfer / Knowledge sharing	13	30,6%
3/ Networking and partnership building	7	16,6%
4/ Cooperation for Trustworthy ITC	2	4,7 %

More detailed responses in the annexe

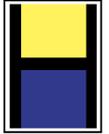


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Question 2

**Do you have priority countries  
/ regions?**

**If so, please list them and explain why.**



# Country/region priorities

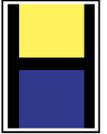
Country/region	#
<b>Pacific/Asia</b> China 13, South Korea 10, Japan 6, Singapore 1, Taiwan 1, Hong Kong 1, Australia 3	34
<b>North America</b> (US, Canada, Silicon Valley, NY, Boston, Montréal)	21
<b>Latin &amp; South America</b> Brazil 9, Mexico 3, Columbia 2, Panama 1, Argentina 1, Chile 1, Peru, Venezuela 1)	15
<b>EU &amp; associated countries</b> (Israel & Turkey, Nordics) <b>and Euro Asia</b> (Russia, Uzbekistan, Kazakhstan, Belarus, former Soviet Union)	11
<b>India</b>	7
South Africa, wider Africa, and North Africa (Morocco, Tunesia), Middle East (2)	5
All countries are interesting	4

## ● USA and China

- ▶ considered as "biggest economies" in the world
- ▶ are shaping the universal arena → get informed about best practices and technological roadmaps

## ● USA

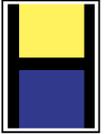
- ▶ Top universities, big companies and investors
- ▶ Leading in e-Health, embedded systems, immersive visualisation
- ▶ Advanced in high-tech ICs and integrated technologies
- ▶ Dominating science without cooperation with Europeans



# Country/region priorities, because

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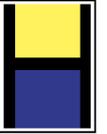
- North America and specifically in Canada stand for strong R&D activities and funding models (USA), NEM members look for consolidated connection with **MIT and Boston** R&D environment.
- **Asia/Pacific, Latin and South Americas**
  - ▶ are all considered **potentially big emerging markets and innovators**.
  - ▶ These countries/regions have **either technological and/or market advantages** which provide fertile domains for disruptive and innovative products/services, design, delivery and support.
  - ▶ Share common challenges in the fields of research of:
    - Information and Communication Technologies,
    - Agriculture,
    - Health,
    - Energy efficiency.
    - Successful partnerships would result in innovative products for the advancement of sustainable development, economic growth and the improvement of the quality of life in all associated Regions.
  - ▶ There is a **need to support EU-LAC policy dialogue** in science, technology and innovation to ensure continuity and enhance collaborative research and innovation in Horizon 2020.
  - ▶ Content players have a memorandum of understanding between equivalent organisations (India, UK). They are working on establishing platforms in both countries. One of the themes: Future Cities in India.



# Country/region priorities, because

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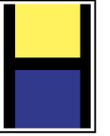
- **Creative industries**
  - ▶ **are emerging** in Japan, China, South Korea and India, more specifically in the gaming industry,
  - ▶ Are interested in accessing international markets, inter-clustering.
- **From a RTO point of view**, priority countries are indeed those with a more developed technological knowledge, where exchange practices can be boosted.
- Develop **INCO trust and BIC countries' models** to other countries and extend it to NEM
  - ▶ In INCO-TRUST countries were U.S, Australia, Japan, Korea and Canada.
  - ▶ BIC countries: Brazil, India and South Africa (and wider Africa).
- Besides the **BRIC countries** (Brazil, Russia, India and China), there is significant interest in **Argentina, Middle East** (UAE, Qatar, Bahrain, Kuwait, Saudi Arabia), Kazakhstan, Pakistan, Japan, Philippines, Singapore, Malaysia and Indonesia.



# Country/region priorities, because

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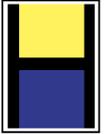
- The BRIC countries are having large economies with huge disparities and as such offer **opportunities for the development of joint research on how to use media for bettering life and lower such disparities.**
- **Boarder countries, with higher growing expectations than BRIC countries:** Nigeria, Ukraine, Pakistan, Vietnam, Thailand, Argentina, Croatia, Jordan, Lebanon, Emirates, Kenya and Serbia.
- Some identified issues:
  - ▶ The Middle East has lots of resources and is aiming to play a **major role in media** (see al Jazeera).
  - ▶ Pakistan and Kazakhstan are **investing in education, culture and internationalisation.**
  - ▶ Japan has developed significant contribution to **the technology used for media** (especially for consumer generated one) and has a long tradition in **visual arts** that could be used to inspire (see Hokusai).
  - ▶ Singapore, Malaysia and Indonesia have **good economies and represent (to some extent) a challenge.**



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Question 3

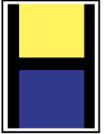
**How could NEM support your international strategy?**



# NEM as strategic mobilizer and info provider

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- **Information provider through knowledge and experience sharing**
  - ▶ On needs and societal challenges in third regions and countries
  - ▶ Selection each country best capabilities
  - ▶ **Sharing** experiences from other organizations working on a similar technological domain;
  - ▶ Sharing an international "capability map" on a technological domain and where this expertise is geographically more evolved;
  - ▶ Listing geographically the key organizations on the targeted domain.
  - ▶ By sending us the priority topics that are open for international collaboration and directing requests for partners from international regions (India for exemple).
  - ▶ Give information of collaboration opportunities in the objective and specific calls.
  - ▶ Offering research results, expertise and skills.
  - ▶ **Provide market studies, statistics, figures every year (comparison EU and World)**
- **Liaison**
  - ▶ Develop a structured and prioritised plan for liaison activities with key players / markets and reciprocal NEM organisations from outside of Europe.
  - ▶ Try to identify opportunities for a few key collaborative projects, especially within the framework of H2020 which allows participation for international partners from outside of the EU.



# NEM as facilitator and networker

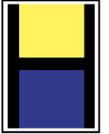
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- **Facilitator and networker (16)**

- ▶ Help to find partners / Identify opportunities and potential partners (including clusters to obtain information on SME)
- ▶ Provide matchmaking - more information about members on the NEM website and their specializations
- ▶ Acquire more SME members for the NEM network (mobile, gaming, advertising, digital design)
- ▶ Do more small scale meetings in several member states
- ▶ Make the international strategy part of European rather than single company or single EU country strategy
- ▶ Lead the way to international contacts and projects
- ▶ Within partners and (potential) clients
- ▶ Make benefit small companies of the network of NEM representatives
- ▶ Organize bilateral networking (physical and virtual sessions)

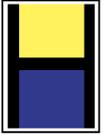
# NEM as event organizer and network facilitator

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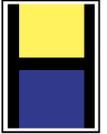


- (!) A workshop series which is dedicated to produce some publications (in cooperation with academia):
  - ▶ Well chosen specific topic, participants by invitation and open call,
  - ▶ Survey papers for top journals or specific enhancement of methods by combining expertise,
  - ▶ First workshop is on determining the papers to be written: authors and subjects,
  - ▶ Second workshop is on presenting the cooperative research results, discussions,
  - ▶ Publication of the papers.
- (!) Through specific funding possibilities, initiate collaborations, such as travel funds for short stay visits (like in COST Actions, short term scientific missions)
  - ▶ To allow the creation of project ideas, such as 'proof of concept projects' and 'specific case studies',
  - ▶ Proposals which allow a quick and fast turn around and review so that cooperation without long application durations can happen.

# NEM as facilitator and operator for members' interests



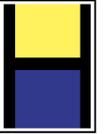
- (!) **Launch a specific initiative related to gather scientists interested in media, communication and technology to share experience and discuss on topics like:**
  - ▶ the benefits/risks of social media use (and abuse),
  - ▶ the role technology has to play to support media,
  - ▶ the role that media should play in providing vision and drive to scientific and technological advancement,
  - ▶ the role technology and media could and should play in supporting the interest in science and scientific studies,
  - ▶ the role media can play to support the fight to illiteracy and betterment in education for all,
  - ▶ the role media can play to support more engagement in scientific studies in the younger generations.
- Support projects with regions
- Support “twinning” agreements between SMEs



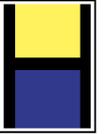
## NEM as facilitator and operator for members' interests

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- **Organize brokerage event/B2B convention/Investors fora for companies**
- **Organize discovery trip for European companies in Asia, South America, Africa etc. (pooling resources + networking)**
- **Become the operator of a European booth at international events**
  - ▶ like Siggraph for example
- NEM is considered a big network studying on the needs and ICT solutions for CCIs in order to transfer innovation to support their work. NEM could focus on the realisation of some initiatives in selected countries/regions in order to transfer knowledge and innovation and promote opportunity of collaboration with European organisations involved **in Culture, Creativity, Media and Content.**
- **Customise the BIC models for the NEM areas.**
  - ▶ Examine them and see if it was feasible.
  - ▶ For topics like Cyber Security, the BIC project has been advocating a shift in emphasis from the tactical bi-lateral (country to country and/or region to region) collaborations to a strategic multi-lateral (multiple country to country and/or multiple region to region) approach for Int'l cooperation.
  - ▶ The views of NEM on this would be particularly welcomed and whether this would be useful for the NEM community.



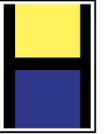
- Add to position papers and NEM summit publications:
  - ▶ Commun white papers with selected regions
  - ▶ Publications after specific workshops



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Question 4

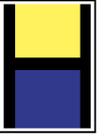
**How could you contribute to  
NEM's international strategy?**



# NEM members willing to participate

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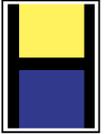
- Share relevant information and best practices in a specific domain and experience
- Participate to identify and promote intra/extra European activities
- Share international experience in given regions
- Supervise a publication
- Conduct workshops
- Integrate a NEM commission and be active
- Provide and facilitate contacts in different regions
- Matchmaking with content industries and SMEs (Dutch level)
- Attending networking events for NEM and preparing specific projects and calls
- Offering research results
- Organize seminars / symposia / WS, invite colleagues to WS and conferences
- Expanding the range of partners
- Establish collaboration agreements
- Enlarge the NEM community bringing CCIs and ICT incubators working in the cultural and creative sector coming from those countries



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Conclusions and next steps

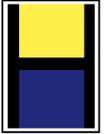
# **Global NEM strategy for international cooperation**



# Next steps

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- Build the global NEM Strategy on
  - ▶ ... previous actions + expressed point of views and interests.
- Set-up the international WG
  - ▶ Thierry Beaujard, MediaDeals, Germany
  - ▶ Silvia Boi Engineering, Italy
  - ▶ Frank Boyd, KTN, UK
  - ▶ Jim Clarke, TSSG, UK
  - ▶ Pierre-Yves Danet, Orange, France
  - ▶ Hadmut Holken, Holken Consultants & Partners, France
  - ▶ Roger Torrenti/Sigma Orionis, France
  - ▶ .. those who declared their interest in the survey,
  - ▶ Others who may want to join.
- Design tasks within this group
- Discuss and validate the **international cooperation strategy** / « global NEM » strategy
- NEM strategy and action plan ready for September 2014
- NEM strategy presentation at the next GA/NEM summit 2014
- Set up the relationship with peers (ETPs and extra-European ETPs)



Thank you  
for your attention.

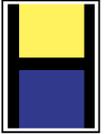
Special thanks to all respondents!



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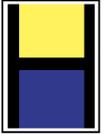
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Annexes Detailed question 1

# Interest in international cooperation



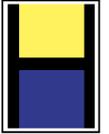
## Business development / Market diversification (3/3)

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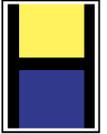
- New business opportunities & development (eg. embedded systems)
- Accelerate business opportunities (for SMEs)
- Commercial interest outside Europe
- Opening market for products and technologies and for integration of technologies beyond what is available currently in Europe ,
- New markets for innovative value added services and innovative content
- **Market diversification**
- Market expansion
- “Technology innovation and commercial development of the out come needs to be on a global scale to be truly successful. This will allow products and services to have larger mass market appeal and hence drive success. As such, key European players need to be aware of the requirements from outside of Europe and try to work with non-European partners to drive global take-up of the services and products”.

## Business development / Market diversification (2/3)

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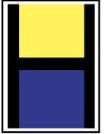
- A must for the European organizations to strengthen the collaboration with companies outside Europe in order to reach greater markets. These collaborations **will provide a sound knowledge of international markets** by the participation of extra-European local companies, and will help to introduce European technology in areas **where traditionally only buy national products or products delivered by national companies**. Clear examples are Brazil and China, where European SMEs need a permanent presence through other/affiliated national companies.
- Successful partnerships would result in innovative products for the advancement of sustainable development, economic growth and the improvement of the quality of life in all associated Regions.
- Business development for my company in extra European Countries is of strategic interest in R&D international connections and networking



## Business development / Market diversification (3/3)

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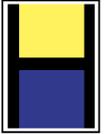
- A cluster is entitled to help its members **access international markets** (a service we provide to our members). Our cluster is also very much interested in **inter-clustering activities**.
- Because it will open more opportunities for making new contacts and finally new business.
- Increasing market share requires **specialized knowledge to support targeted marketing** on one hand and unique, adaptable solutions on the other. These as objectives can only be achieved through multifaceted, multidisciplinary and adaptive/flexible international collaboration, which capitalizes on local/national/regional strengths (i.e. technological, social, cultural, diversity, education, etc) to render effective services/products delivery and life cycle support.
- Get financial support, Develop joint projects,
- Expand our market and establish relationship with new research and industrial partners. Industries from for example South America as partners in EU project could be important. Due to the much larger market the potential impact and ROI of the projects would be larger.



## Knowledge transfer / Knowledge sharing (1/3)

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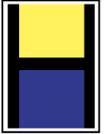
- Bringing in new technologies from outside Europe.
- Take good ideas from extra-European countries
- Make European technology known
- International cooperation brings new opportunities to exchange technological expertise and new capabilities not developed before.
- Research knowledge not always available within national boundaries
- "New blood" and fresh point of view some time is necessary needs just for stable market
- It will enable cross-border knowledge sharing and learning, and enable transnational technology transfers.
- Do research into and with the creative industries and aim to broaden our research internationally (CIRCA - Creative Industries Research Center Amsterdam, University of Amsterdam). Therefore, we are much interested in **cooperation with foreign partners, research institutions as well as creative industries.**



## Knowledge transfer / Knowledge sharing (2/3)

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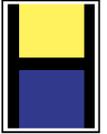
- This contributes a new-unusual look at the problem and successful solutions to many important problems
- share common challenges in the fields of research of Information and Communication Technologies, Agriculture, Health, Energy efficiency.
- Because a lot of excellent research and breakthroughs are happening outside Europe and we **should be up to date and on board** for this developments. It is in particular the case for my research on Multisensory experience for Interactive Technologies (see <http://www.multisensory.info/> -- where **US and South Korea, Singapore** are leading research cooperators).
- There is a need to understand what others do and adopt best practice. Also to help them develop adopting our best practice. **Standardisation is a key strategy in going forward.**
- Develop in emerging markets (Latin Amercia) Natural expansion and diversification of markets



## Knowledge transfer / Knowledge sharing (3/3)

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- As we are competing in a knowledge society and market, it is inevitable that the market and industry cannot be knowledge and innovation restricted in region or a continent. International collaboration is an imperative.
- Latin America, in particular emerging economies: Mexico Brazil Argentina Chile Colombia Peru Venezuela There is a need to support EU-LAC policy dialogue in science, technology and innovation to ensure continuity and enhance collaborative research and innovation in Horizon 2020.
- Other extra European countries will provide new expertises and different ways of thinking that will provide both sides many benefits (south Korea, Japan, China).
- Every cooperation may bring chances to enhance the way we can improve NEM, increase the collaboration possibilities and learn new successful business models
- The UK Knowledge Transfer Network has a policy of seeking opportunities for collaborative research projects between UK businesses or universities and counterparts in other countries. We have a mandate to do this from the UK government and the Technology Strategy Board. We work in collaboration with the UK's Science Innovation Network and with UKTI.



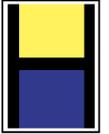
## Networking and Partnership building

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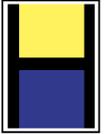
- International cooperation will enable partnerships and networking with best in class institutions (2)
- **Enlarge the research and innovative collaborations to a stronger international network**
- **Together we are stronger, we can learn and benefit from each other (2)**
- Collective fist against other (upcoming) regions and continents
- A fruitful association of European countries with extra-European Regions benefits the ideal of global advancement in a unified front against the crises of our time.

## Projects related to the building of International cooperation for Trustworthy ICT

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- Models developed could (easily) be extended to other domains, including NEM 1
- Projects related to the building of International cooperation for Trustworthy ICT:
  - ▶ FP7 INCO-Trust project (2008 - 2010: <http://www.inco-trust.eu/>),
  - ▶ FP7 BIC project (2011 - 2013: <http://www.bic-trust.eu>).
- *“Emerging economies are located mostly outside of Europe. Media (especially grasso-rooted ones) are booming and the Arab Spring has proven the power of media (and social media in particular) even in countries where illiteracy is still a significant problem. At the same time there is a need for addressing the tastes, expectations and needs of those markets and social communities that cannot be achieved unless there is mutual understanding and trust. These can only be built via cooperation and so the interest is significant on my side.” (ieee)*



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Annexe

**Topic**