NearUS

Network for European Research
and Innovation acceleration in the US

Mapping of clients and their demands

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Task leader/Main author	**inno TSD** **Hubert Santer, Eva Fadil, Krisztina Dax, Svetlana Klessova**
Contributing partners	**SPI, RCISD.** **Revision by DLR, EAEC, EBN, InBIA, INNO, RCISD, SPI**

Abstract: This report analyses the demand and latent needs of European stakeholders from the Research and Innovation (R&I) community seeking for support to internationalise to the US – the expected potential future beneficiaries of NearUS services –, quantifies this demand for support and the potential market for the planned services- so-called 'demand analysis'.

Keywords: demand, analysis, survey, needs, clients, beneficiaries, services, mapping

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Executive Summary

The NearUS project is an initiative funded by the European Commission (EC), and initiated on the 1st of April 2017. NearUS will establish a Network of Centres of European Research and Innovation as central contact point for support to EU research and innovation (R&I) actors (from universities, start-ups, SMEs, etc.) seeking collaboration with and in the US.

The aim of this report is to identify the demand for the services proposed to European stakeholders by the NearUS project. The primary source for this analysis was the NearUS survey launched towards respondents potentially interested in NearUS activities. For completing these elements, a literature review was undertaken and 15 interviews conducted with various type of EU stakeholders. Information on the methodology and literature analysis results are available in chapters 2 and 3.

Main findings of the survey and interview results

In the survey, 61% of the interested respondents marked themselves as public organisations, while 23% declared themselves as private. The findings suggested that the interested respondents were mostly research organisations and universities.

The relatively low percentage of private respondents, SMEs and start-ups does not mean that there is a lack of interest towards US, as the overall percentage of these type of stakeholders amongst all survey respondents was low. Interviewee from the private sector confirmed the interest for NearUS services for these segments.

Many respondents showing interest in the US are from Germany and Austria – countries where a variety of support services exist. Respondents from Eastern European countries, especially Bulgaria, Hungary, Poland, Romania, Slovenia showed a very high interest in the US and in support. Organisations from other European countries such as Portugal, Spain, Belgium, France, the UK, Ireland and Denmark, also express needs for support.

Regarding the thematic areas of interest, “Information and Communication Technologies” and “Human health and social work activities” (notably medical services) are respondents’ main thematic areas of concern. “Energy production and distribution” comes third, followed by “Manufacturing and industry”.

The complete analysis of the survey statistics and interviews can be found in chapter 4: European Research and Innovation stakeholders’ needs for support for accessing or expanding to the US.

Main findings per strand

Research to Research (R2R)

64% of the respondents of the survey identified R2R as their strand of interest, out of which most were public research type of organisations or universities. The most demanded service is ‘Research connection symposia’, followed by a very high need for ‘Working visits’ and ‘Matchmaking events’.

Research to Market (R2M)

60% of the respondents of the survey identified R2M as their strand of interest. Within this stream, Analyses/ Studies is the most demanded service. There is also a high demand for Exploration tours and Matchmaking events. The strand services were initially designed mainly for start-ups and spin-offs, however it became clear that most of such organisations considered

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their strand to be ‘B2B’ rather than ‘R2M’ since the respondents’ statistics were more similar to the R2R strand: mostly public research organisations and universities.

Business to Business (B2B)

34% of the respondents of the survey identified B2B as their strand of preference. Unlike the two other strands, 47% of the respondents are private organisations. Most responses came from Austria, however Belgium, Hungary, Poland and Bulgaria seemed to be relatively more interested in the B2B stream; compared to the other ones.

The most demanded service in this stream is ‘Matchmaking events’, followed by ‘Exploration Tours’ and ‘Business acceleration programme’. There is a high need for support for introduction to end-clients, local community and partners for these stakeholders.

Transversal services

These services were common to all three strands; The analysis show there is a high demand for ‘Step-by-step navigation on the Network’s webpage, a relatively high demand for ‘Digital tools’ and a moderately high interest for ‘Training events’.

Budgetary considerations

In addition, an overview on budgetary considerations for all the strands and services is provided in chapter 5, thus giving further insights on European demand, lack of investment capacities and considerations over NearUS value proposition.

Main conclusions

Overall, the in-depth analysis of the survey data and interview answers proved a generally high interest towards collaboration with the US amongst European R&I stakeholders, as well as towards the proposed NearUS services. Chapter 6 presents the major conclusions and the next steps, which will consist of comparing the results stemming from a support service offer analysis with the results of the needs analysis to identify the market gap (aiming at providing recommendations for the set-up of the Network and the fine-tuning of its services).

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The NearUS Project

Network for European Research and Innovation acceleration in the US

The NearUS initiative will establish a Network of European Research and Innovation Centres throughout the United States. It will act as a central contact point for European research and innovation (R&I) actors seeking to grow and reinforce collaboration across the Atlantic. The mission of the Network is to provide standardised as well as tailor-made, research & innovation internationalisation support services to European researchers and innovators, to accelerate access to the US market, and maximise chances of success. The initiative started in April 2017.

NearUS targets to serve the following actors:

- Accelerators
- Businesses
- Clusters
- Entrepreneurs
- Funding Agencies
- Incubators
- R&I Networks
- R&D institutes and labs
- Research managers and administrators
- Research Parks
- SME's
- Start-ups
- Universities
- University Associations

The NearUS Network will include the following entities:

- **One "Coordination Node" in Europe** (at EBN, Brussels)
- **One "Coordination Node" in the US** (at InBIA)
- **Two physical "Landing Hubs":**
  - **San Francisco Centre**: NearUS West Coast Landing Hub (managed by EAEC)
  - **Boston Centre**: NearUS East Coast Landing Hub (managed by InBIA)
- **Five Associate Hubs across the US**, and plans to expand the NearUS Network beyond these first five Hubs, over four years.

The NearUS Network is built on local US experience and strong existing ties between the EU and US, while providing new researcher- and entrepreneur-serving capabilities which address the resource gaps necessary to enable access for all EU Member States and Associated Countries, as well as every state in the US.

A variety of services are proposed for researchers and entrepreneurs engaged by the Network during the pilot phase, then the Centres' pilot activities will be evaluated to inevitably retain the initiative's most successful components to ensure a sustainable plan for NearUS in the future.

Services will target various commercially viable technology maturity levels (**Research2Research**, **Research2Market** and **Business2Business** stages), and will include research connection symposia, business matchmaking opportunities, working visits and innovation tours to US organisations to explore technology/product partnerships and/or business development middle / long term opportunities, pitching to potential investors, entrepreneurial bootcamps, work space access, hands on business acceleration programmes, and more. As the NearUS initiative is highly competitive to best serve the strongest researchers

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and entrepreneurs, all services must be applied for through an open and transparent selection mechanism.

60 associated partners in the EU and US support the NearUS Network, with more associated partners expected in the future.

NearUS Consortium:

Coordinator: German Aerospace Center (DLR), Germany

Partners:

- inno TSD, France
- European Business and Innovation Centre Network (EBN), Brussels
- International Business Innovation Association (InBIA), USA
- European American Enterprise Council (EAEC), USA
- INTRASOFT International (INTRA), Luxembourg
- Sociedade Portuguesa de Inovação (SPI), Portugal
- Regional Centre for Information and Scientific Development (RCISD), Hungary
- National Council of University Research Administrators (NCURA), USA

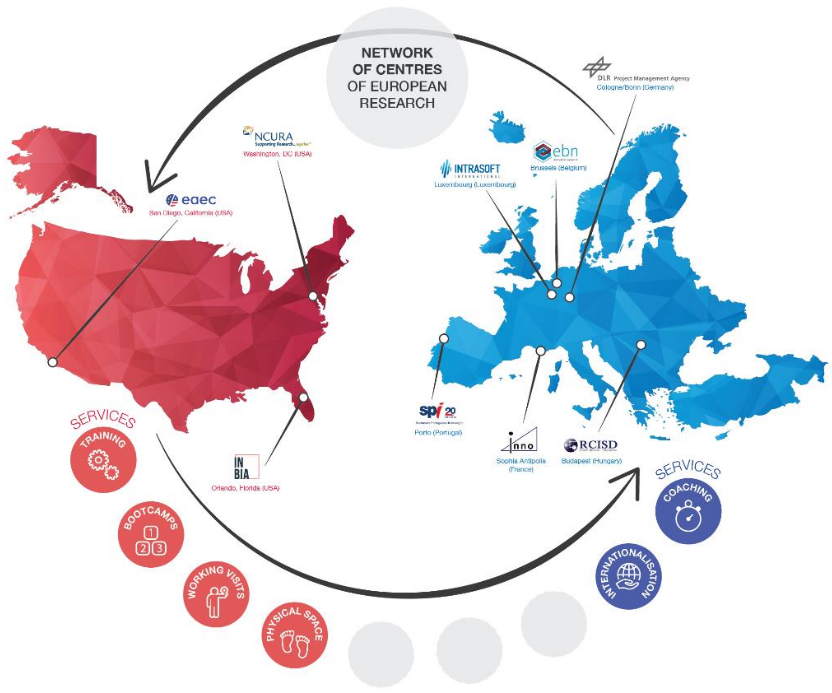

Figure 1: NearUS Network

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List of Abbreviations

Abbreviation	Explanation
CEBRABIC	Centre for Europe-Brazil Business Innovation Cooperation
ERICENA	European Research and Innovation Centre of Excellence in China
EU	European Union
FDI	Foreign Direct Investment
FP7	Seventh Framework Programme for Research and Technological Development.
H2020	Horizon 2020
HQ	Headquarters
IPR	Intellectual Property Rights
JELO	Joint European Liaison Offices
JRC	Joint Research Centre
RTDI	Research, Technology, Development & Innovation
R&D&I	Research, Development and Innovation
R&I	Research & Innovation
ROI	Return on investments
SME	Small and Medium Enterprise
STI	Science, Technology and Innovation
US	United States of America

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1 Introduction

The NearUS initiative was launched with two other ("sister") projects within the framework of the European Commission Horizon2020 (H2020) programme to establish European Research and Innovation Centres in the US (NearUS)[1], China (ERICENA)[2] and Brazil (CEBRABIC)[3].

The aim of NearUS is to establish a self-sustaining Network of Centres connecting and supporting European researchers and innovators to succeed in the US market and, as a result, to strengthen the position of Europe as a world leader in science, technology and innovation. The mission of the Network is to provide tailor-made, research & innovation internationalisation support services to European researchers and innovators, in particular entrepreneurs, to accelerate their access to the US market and maximise their chances of success there.

A number of services were initially pre-defined during the NearUS initiative preparation, thanks to the sound experience of its members and the assets of the project, for example:

- Involving two major networks, EBN – European Business and Innovation Centre Network in EU and InBIA – International Business Innovation Association in the US
- Involving partners providing support services via EEN - Enterprise Europe Network and individually, i.e. part of their existing transatlantic acceleration, open innovation and tech transfer mission and activities (EAEC)
- Building upon the existing US and EU offers for European organisations, through its partners' experiences in the field
- Combining know-how in ICT, health/biotech, nanotech, energy, and beyond, also corresponding to the EU thematic collaboration priorities with the US[4]
- Getting feedback and support by a pool of 60 Associated Partners - leading EU and US networks and research and innovation actors

In order to assess demand for and fine-tune the proposed support based on feedback from potential customers, and lay the foundations for a sustainable NearUS Network, the NearUS initiative starts with an in-depth market research. This work focuses on:

- analysing the existing service providers for European stakeholders who are developing or would like to develop activities in the US, and identifying potential synergies – so-called 'offer analysis'
- analysing the demand and latent needs of European stakeholders from the Research and Innovation (R&I) community seeking for support to internationalise to the US, and quantifying this demand for support and the potential market for the planned services – so-called 'demand analysis'
- crossing both analyses and identifying the 'gaps', threats and opportunities -so-called 'gap analysis'

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[1] www.near-us.eu

[2] www.ericena.eu

[3] www.cebrabic.eu

[4] http://ec.europa.eu/research/iscp/index.cfm?pg=US

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On this basis, NearUS will propose an operational plan for activities of the project and the Network in order to meet the demand and be sustainable. This project roadmap will outline the basis for the services developed and deployed at each phase of the NearUS initiative.

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2 Methodology of the demand analysis

2.1 Objectives of the demand analysis and its step-by-step approach

The overall objective of the 'demand analysis' was to identify the demand of European stakeholders from the Research and Innovation (R&I) community seeking support to internationalise to the US and to analyse this demand in order to fine-tune services that shall be offered through the NearUS Network. Beyond identifying clients and their needs, the 'demand analysis' also aims to verify the adequacy of the planned services foreseen by the NearUS initiative for potential clients. At the outset, the developments are overly inclusive in defining the total 'market', thus considering all types of stakeholders, their demand for services, their needs, and encompass all services. The NearUS approach considers conclusions from previous projects for defining this total market broadly enough to include all potential end-users but also to tackle inappropriate drivers of demand and reduce the risk of 'misorientation of support services.

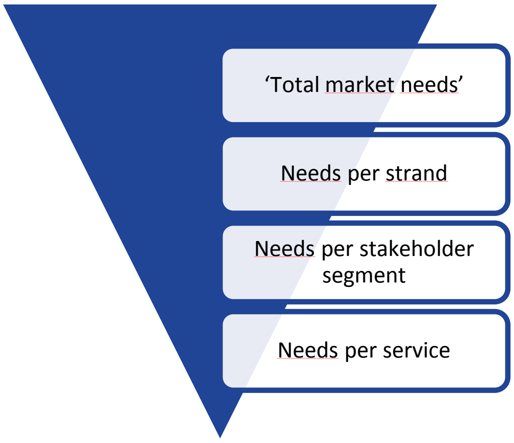

Figure 2: NearUS demand analysis' approach

On the basis of the defined "total market needs", this analysis' second step is to divide the total demand into its main components for separate analysis per strand (or track in US terminology) defined by the project – Research2Research (R2R), Research2Market (R2M), and Business2Business (B2B). It also takes into account the analysis per stakeholder segment – Research, Innovation and Business stakeholders - as well as per type of potential support service proposed in NearUS.

This segmentation enables us to define each category small and homogeneously enough so that the drivers of demand should apply consistently across its various elements and make each large enough so that the analysis will be worth the service developments.

The demand analysis was especially focused on a widespread online survey and a number of interviews, complemented by a literature review. Based on the analysis of this collected information, conclusions/recommendations are presented in Chapter 6.

2.1.1 Literature review

The literature review included the analysis of several main sets of sources:

- Report 'Operational Feasibility Study for STI Joint European Liaison Offices for European Research Organisations in Argentina, Australia, Brazil, Canada, China,

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Japan, New Zealand, Russia, South Africa and the US'[5], and ''European Research centres and representations in the US'[6].These studies were done jointly by several BILAT projects, including BILAT US 2.0.

- Report 'Bilateral Coordination of the Enhancement and Development of S&T Partnerships between the European Union and the United States of America'[7] by BILAT US 2.0
- Report 'Supporting companies go international for research and innovation collaboration – needs and good practices'[8] by BILAT US 4.0
- Other literature sources that deepened these findings. All contents add up to the structure of this document, but also the entire project, and are referenced in the dedicated section 7.1 **Erreur ! Source du renvoi introuvable.**.

Results of the literature analysis are displayed in Chapter 3 - NearUS: a novel EU approach for fostering Research, Development and Innovation (R&D&I).

2.1.2 Online survey – European stakeholders

NearUS online survey - an initiative shared with the European Network projects

The three 'sister' projects - NearUS, CEBRABIC & ERICENA - agreed on sharing efforts on the online survey. Thus, the survey was common to all three projects, the differentiation per country at its start enabling a division of responses and separate analyses. This method also enabled NearUS, CEBRABIC & ERICENA consortiums to combine their dissemination activities thus reaching as many stakeholders as possible and avoiding common stakeholders to be contacted with separate surveys within a short timeframe. This approach also strengthens the collaborative aspect between the three projects and makes the initiatives appear within a joint strategy – the one of establishing a Network of Centres of European Research and Innovation in three countries of strategic relevance for international collaboration.

NearUS survey structure development: Adapting format to targets

The NearUS online survey[9] was designed to gather information from potential end-users and validate hypotheses for NearUS services with quantitative data.

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[5] DLR. Operational Feasibility Study for STI Joint European Liaison Offices for European Research Organisations in Argentina, Australia, Brazil, Canada, China, Japan, New Zealand, Russia, South Africa and the USA. 2015.

[6]FFG. European Research centres and representations in the USA. 2015. Retrieved from http://v2.euussciencetechnology.eu/sites/default/files/Del_1_5%20STI%20JELO_FINAL.pdf

[7] inno TSD. Bilateral Coordination of the Enhancement and Development of S&T Partnerships between the European Union and the United States of America. 2015. Retrieved from http://v2.euussciencetechnology.eu/sites/default/files/Report%20on%20US%20subgrants%20to%20EU%20institutions.pdf

[8] SPI. Supporting companies go international for research and innovation collaboration – needs and good practices. 2017.

[9] Access to the online survey: http://survey.inno-projects.net/index.php/483193?lang=en Beyond 'Demand', the NearUS survey targeted stakeholders from the 'Offer' side as well as organisations and institutions involved in its thematic. As such, the survey provided the opportunity to these stakeholders

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The ‘Demand side’ of the NearUS survey was designed as a dynamic questionnaire, focusing on services and including a specific set of questions adapted to the 3 strands defined above: R2R, R2M and B2B, each of them addressing specific target groups (see). This segmentation encompasses questions relevant to the main types of organisations and respondents targeted by the survey (see Segmentation of target groups: Research, Innovation and Business section) and their environment. These refinements enabled respondents to progress through the survey according to their drivers, thus providing useful information on the needs associated to each stakeholder’ segment.

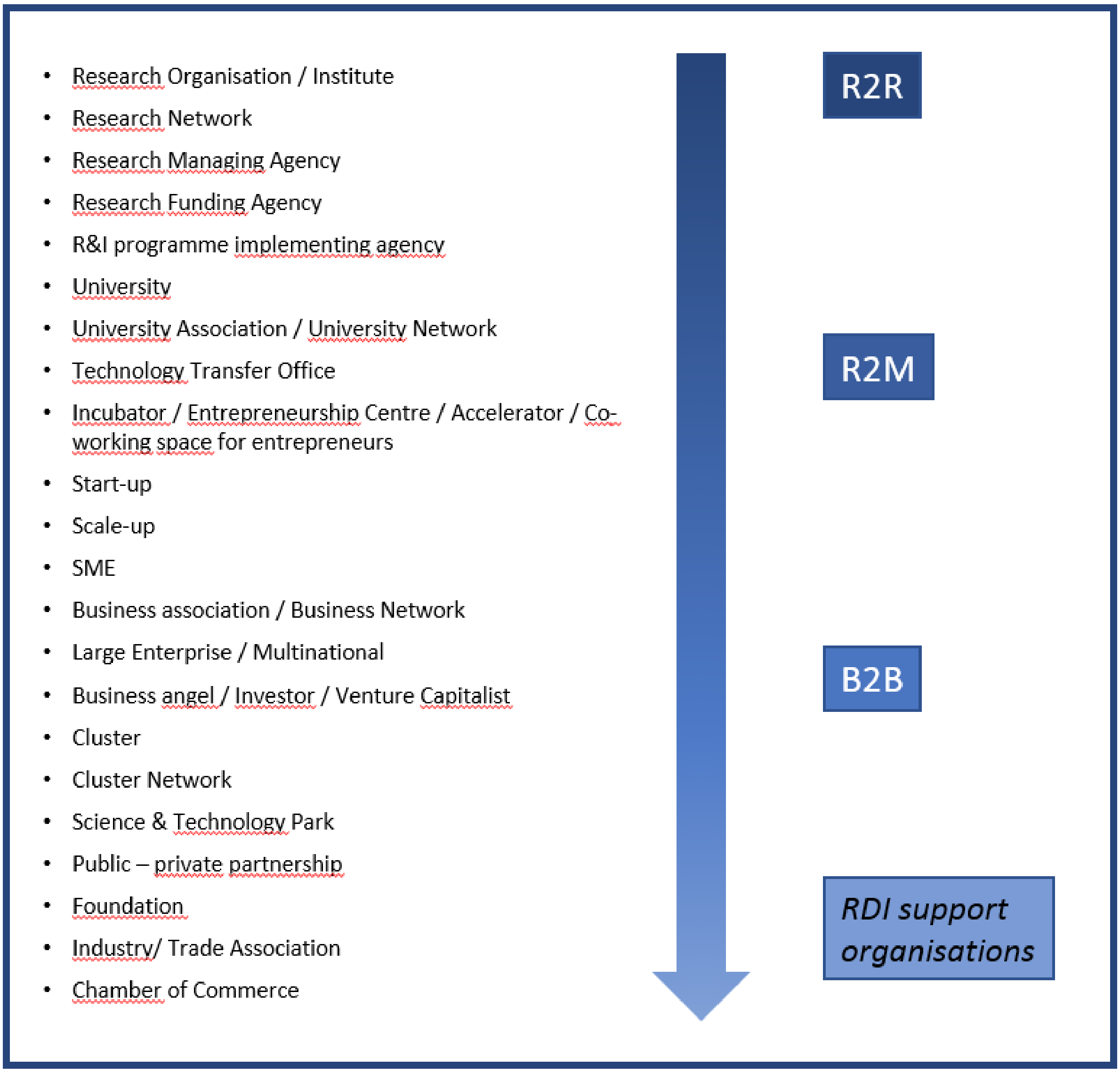

Figure 3: Organisations targeted per strands

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to respond questions adapted to their activities and needs. These findings were summarised in the NearUS report “Mapping of existing tools and services/service providers”.

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Respondents were given the ability to rate their interest for each service foreseen within the project and provide information on their requirements about timing, frequency and other specific factors. A section dedicated to their investments in such domain was included in this survey's part. An overview of the NearUS questionnaire's structure is available in Table 1.

Table 1: NearUS survey structure definition

Structure	Content	Remark
A: YOUR ORGANISATION	Basic description of the respondent Organisation.	*See data privacy management section*
B: YOUR THEMATIC and GEOGRAPHICAL AREA(S) OF INTEREST	Framing of the geographical (US; Brazil; China) area of interest of the respondent. Framing of the theme / sector of interest of the respondent (ICT, health, environment, etc.).	This section was added for dividing / identifying the respondents between the 3 projects for data processing
C: YOUR FIELDS OF ACTIVITIES	Framing of the type of respondent between a service seeker (thus a potential NearUS customer) and a service provider (then being a NearUS potential "competitor" or "collaborator")	This section was added for dividing / identifying the respondents relevant to the "demand" and "offer" analyses
D: YOUR NEED(S) FOR SUPPORT	Section dedicated to the "demand analysis"	Section only open to respondents who identified themselves before as "service seeker"
D – PRIME: YOUR NEED(S) FOR SUPPORT	Section dedicated to the "demand analysis" – focus being set on the monetization of the services potentially provided	
E: YOUR SERVICE OFFER	Section dedicated to the "offer analysis"	Section only open to respondents who identified themselves before as "service provider". This section was added for input to the offer analysis
F: YOUR CURRENT ACTIVITIES and SUPPORT	Framing the existing supporter(s) of the respondent in its activities with the US	
G: DO YOU WANT US TO KEEP IN TOUCH	*Optional* contact details enabling the respondent to be informed of next NearUS (and other) project activities	The EU rules regarding data privacy were applied

Particular attention was paid to respondents' data confidentiality, as described in annex 0.

Online survey dissemination

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The survey' dissemination strategy was designed in parallel to the survey's setup, jointly with the two other 'sister projects'. A wide array of dissemination channels, such as: mass-mailing, web-news, social networks, newsletters and more were displayed. An overview of the NearUS online survey dissemination by its partners is available in annex 0. These dissemination efforts took place during the entire duration of the survey (from the start of the project on 01/04/17, 10:00 CET until the survey was stopped on 30/05/17, 00:00 CEST).

Out of the overall 863 respondents who reached question B2 "In which country (countries) are you interested for your Research & innovation (R&I) activities?", only 587 were European (entries from Brazil, China and other non-European countries, except for 10 US entries, were excluded for the purpose of the analysis).

Table 2: 577 European respondents' countries of interest summarizes the 577 European survey respondents' (excluding the US entries for the purpose of this table) overall interest in % per geographical territory.

Table 2: 577 European respondents' countries of interest

Country*	Percentage
United States of America (US)	72.10%
China	64.12%
Brazil	57.54%
None of these 3 countries	6.41%

Thus, out of a total of 587 respondents that disclosed their aimed destination for their R&I activities, the aim was to filter those that are looking for support in the US. This was done in 2 steps:

- Filtering for those that marked US as a country of interest: out of 587 respondents 425 were interested in the US
- Filtering for service-seekers only: out of 425 organisations interested in the US, 318 were service-seekers, thus looking for support for their activities

Thus, it can be concluded that there were 318 respondents who were seeking support for their collaboration/expansion plans in the US. This is the dataset used for the analysis of the online survey results in NearUS. This corresponds to 54,2% (318/587) of all extractable survey responses. Responses relevant to this analysis are further detailed and processed in chapter 4 - European Research and Innovation stakeholders' needs for support for accessing or expanding to the US".

2.1.3 Interviews

Beyond quantitative data, the demand of the stakeholders – potential customers were explored through interviews. This step was designed to complement the quantitative data gathered through the survey with a qualitative analysis to better understand the factors and drivers of the demand in each category (see Table 3: List of interviewees below).

Table 3: List of interviewees

Date	Strand	Organisation type	Country	*Interviewer*
08.06.2017	R2R	University	Germany	*RCISD*
06.06.2017	R2R	University	Hungary	*RCISD*
12.06.2017	R2M	Accelerator	Romania	*RCISD*
28.06.2017	R2M	Technology Transfer	Bulgaria	*RCISD*
26.06.2017	B2B	Start-up	Hungary	*RCISD*
15.06.2017	B2B	SME	Hungary	*RCISD*
04.06.2017	B2B	SME	Hungary	*RCISD*

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15.05.2017	Policy Maker	EU EU-US collaboration official	Estonia	*RCISD*
30.06.2017	B2B	SME (Medium)	Ireland	*SPI*
30.06.2017	B2B	SME (Small)	Portugal	*SPI*
30.06.2017	R2R / R2M	University / valorisation office	Belgium	*SPI*
30.06.2017	R2R / R2M	Technology Centre	Germany	*SPI*
30.06.2017	R2R / R2M	Technology Centre	Spain	*SPI*
30.06.2017	B2B	Start-up	Spain	*SPI*
04.07.2017	R2M	Accelerator/Cluster	Ireland	*SPI*

An interview guideline for 'Demand' stakeholders was drafted and agreed and is available in the annex 'Interview guidelines'.

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3 NearUS: a novel EU approach for fostering Research, Development and Innovation (R&D&I)

3.1 US – EU R&D&I collaboration: Multiple aspects and tremendous budget flows

The Centre for Transatlantic Relations and American Chamber of Commerce European office published the "2017 Transatlantic Economy" report[10], that provides up-to-date and relevant insights for NearUS fields of action. The following conclusions from this document provide an overview of the US-EU collaboration framework, namely:

"Over many decades no place in the world has attracted more US foreign direct investment (FDI) than Europe. Since the start of this decade, Europe has attracted 58.5% of total US global investment — more than in any previous decade. 70% of total US FDI outflows globally went to Europe in 2016. Europe, on the other side, accounted for 72% of global FDI inflows into the US of $385 billion.

The US and Europe are each other's most important commercial partners when it comes to digitally deliverable services. Cross-border data flows between the United States and Europe are by far the highest in the world – 50% higher than the data flows between the United States and Asia in absolute terms, and 400% higher on a per capita basis. Bilateral US-EU flows in R&D are the most intense between any two international partners. In 2014 US affiliates invested $31 billion in research and development in Europe, a record annual total, representing 60% of total global R&D expenditures by US foreign affiliates.

R&D expenditures by US affiliates were the greatest in Germany ($8.3 billion), the United Kingdom ($6.3 billion), Switzerland ($4.1 billion), Ireland ($2.4 billion), France ($2.4 billion) and the Netherlands ($1.2 billion). These six nations accounted for 81% of US spending on R&D in Europe in 2014.

In the U.S, R&D expenditures by majority-owned foreign affiliates totalled $57 billion in 2014. R&D spending by European affiliates totalled $42 billion, representing 73.6% of all R&D performed by majority-owned foreign affiliates in the United States."[11].

[10] Hamilton, D. S., & Quinlan, J. P. The Transatlantic Economy. Center for Transatlantic Relations Johns Hopkins university. 2017. Retrieved from http://transatlanticrelations.org/wp-content/uploads/2017/03/170223_FULL-BOOK-2.pdf

[11] Hamilton, D. S., & Quinlan, J. P. The Transatlantic Economy. Center for Transatlantic Relations Johns Hopkins university. 2017. Retrieved from http://transatlanticrelations.org/wp-content/uploads/2017/03/170223_FULL-BOOK-2.pdf

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3.2 Needs in the transatlantic R&D&I collaboration – findings from recent projects and initiatives

3.2.1 US STI JELO survey main outcomes

The NearUS project origin can be traced back to the outcome of the STI Joint European Liaison Offices (JELO) survey that was coordinated by BILAT US 2.0 and made accessible online from September 1st to October 31st, 2014. Approximately 400 R&I actors in 42 European Union Member States and Associated Countries were contacted, which resulted in 94 exploitable responses overall. The results of the survey and explanation for why NearUS, CEBRABIC and ERICENA were created can be found below.

Focus: BILAT US STI JELO study[12]

BILAT-projects are EU-funded projects that aim at enhancing and further developing the research and innovation cooperation between the EU and an international partner country.

Regarding the US, BILAT US 4.0 has been building on the efforts of BILAT US 2.0 since 2016. The BILAT US 4.0 project aims at supporting the EU-US STI partnership on policy and scientific level with measures addressing common goals shared by the EU and the US

Within the scope of 12 BILAT-projects, a survey was jointly conducted in order to examine the interest of European research organisations in the establishment of STI JELOs. The purpose of STI JELOs, according to the BILAT-projects, would be to support and enhance cooperation between EU and foreign stakeholders in the field of science, technology and innovation. This would enable EU Research and Innovation actors to increase their visibility, engage in joint research projects, widen their networks, and eventually promote the European Union as a strong and progressive STI landscape.

BILAT USA 4.0

Bilateral Coordination for the Enhancement and Development of S&T Partnerships between the European Union and the United States of America

Figure 4: BILAT 4.0 logo

67% (63/94) of the respondents expressed interest in an STI Joint European Liaison Office outside of Europe. 71% (45/63) of the responding organisations interested in STI JELOs outside Europe would prefer a physical office over a virtual one, of which 54% (34/63) preferred a physical office together with other representations, while 17% (11/63) were in favour of an independent physical office. Regarding the thematic distribution of the respondents, in between 40-50% of respondents worked in the field of Information and Communication Technologies (ICT), Environment and Climate Change, Biotechnology, Energy, Health and medical research, and/or Material sciences and nanotechnology, respectively.

Regarding the destination countries, 45% (42) of the respondents expressed interest in an STI JELO in China, 44% (41) showed an interest in an STI JELO in the US and 40% (38) of respondents were interested in Brazil, making these 3 countries the most aimed destinations for an EU STI office. Due to such demand, three projects were created respectively on the basis of a call launched by the European Commission with the aim of establishing three

[12] http://v2.eussciencetechnology.eu/sites/default/files/Del_1_5%20STI%20JELO_FINAL.pdf

This project has received funding from the European Union's Horizon 2020
research and innovation programme under grant agreement No 733286.

Networks of European Research and Innovation Centres: ERICENA for China, NearUS for the US and CEBRABIC for Brazil.

65% (41/63) of the respondents who were interested in an STI JELO outside of Europe, were also interested in an STI JELO in the US The following map shows the country distribution of organisations interested in an STI JELO in the US in comparison to organisations interested in an STI JELO in general.

One conclusion of the JELO study is that more populous EU countries, such as Poland, Germany, France or Spain seemed less interested in an STI JELO in the US, than "smaller" EU countries, such as Serbia, Croatia, Slovenia, Hungary, Slovakia, Luxemburg or the Czech Republic. Thus, the establishment of an STI JELO in the US would particularly benefit the latter[13]. As a conclusion, "the focus on joining forces and representing ´small´ European countries might give a positive impetus for these innovation followers and moderate innovators in Europe in order to counteract the innovation gap between the European Member States and foster STI cooperate with the US as worldwide important performance leader"[14].

Figure 5: STI JELO study - Number of organisations per country interested in the US

Regarding the respondents' organisation type, research organisations and universities accounted for 68% of the total of organisations interested in an STI JELO in the US Research funding agencies, Other organisations, Technology transfer offices, University associations and SMEs accounted for 32% all together. Regarding their thematic area, more than 50% of the organisations interested in an STI JELO in the US were engaged in ICT (63%), Material

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[13] FFG - Austrian Research Promotion Agency. European Research centres and representations in the USA. 2015. Retrieved from http://v2.euussciencetechnology.eu/sites/default/files/Del_1_5%20STI%20JELO_FINAL.pdf

[14] European Commission. Innovation Union Scoreboard. 2015.

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 733286.

sciences and Nanotechnology, Biotechnology, Energy, Health and medical research, Engineering and/or Environmental and Climate Change (51%).

3.2.2 Goals set by European stakeholders & barriers hindering their Transatlantic Research, Development and Innovation efforts

This chapter summarises/synthesises the findings of two studies, a BILAT US 2.0 impact report entitled 'Barriers and drivers for businesses to engage in transatlantic innovation'[15] and a recent BILAT US 4.0 report called 'Supporting companies go international for research and innovation'[16].

Motivation for entering the US market

- **Tapping into specialised skills**

EU stakeholders may seek collaborations to further develop their own knowledge and skills. This driver is often part of a longer-term perspective where the EU company wants to develop an in-house capability. They often establish collaborations that enable them to access highly specialised knowledge and/or skilled individuals. EU-US collaborations facilitate this by combining strengths, funding and equipment. Such collaborations also enable knowledge exchanges that open both EU and US parties up to new perspectives or approaches to addressing a shared challenge. In the long run, these collaborations can lead to novel solutions to global problems, notably in healthcare and science, and stimulate economic growth.

- **Internationalisation / Achieving target market goals**

European stakeholders usually internationalise to expand their customer base, explore new opportunities for innovative products and technology, increase their global share, etc. However, internationalisation towards a new market often requires customisation or product innovation to meet the preferences of the target country. Engaging in partnerships with actors that are already well established and understand the market can largely facilitate the market entry and in the long run help to reach a strong position in the target market.

Barriers to enter the US market

- **EU-US research collaboration - the issue of reciprocity**

As Joint Research Centre's (JRC) RIO Country Report 2015 states: "policies to open up national programmes to foreign countries are not a priority in US science and technology policy. Barriers to opening up national research programs to participation by non-national individuals primarily lie in visa restrictions. At the country level, Congressional scepticism for funding foreign research can be a major barrier to international cooperation. Additionally, there can also be barriers related to national security policy. US RandD policy does allow for foreign researchers or research teams to move to the US to perform research, normally on a case-by-

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[15] inno TSD. Bilateral Coordination of the Enhancement and Development of S&T Partnerships between the European Union and the United States of America. 2015. Retrieved from http://v2.euussciencetechnology.eu/sites/default/files/Report%20on%20US%20subgrants%20to%20EU%20institutions.pdf

[16] SPI. Supporting companies go international for research and innovation collaboration – needs and good practices. 2017.

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 733286.

case basis. It also allows for foreign researchers or research teams to perform US-funded research in the foreign researchers' home countries. Provisions for these allowances can be found in research program solicitations, which may require a rationale for participation by non-nationals to be submitted along with the research program application."[17].

To address this barrier, researchers, research managers and similar actors could participate in trainings dedicated to tackling these issues & opportunities. Also, matchmaking sessions between peers during which relevant contacts and potential partnerships could be screened would ease the efficiency of European research organisations efforts for collaborating with the US. NearUS will address this issue by offering services such as research connection symposia, where EU researchers and research managers will be able to meet US researchers to collaborate on the prospect for joint research endeavours, or matchmaking events where EU researchers and entrepreneurs looking for partnering and investment opportunities in the US will be matched.

- **Barriers at the initial stage of international collaboration**

Firstly, the initial step of the collaboration process is to find the right partner. Many businesses, especially start-ups and Small and Medium-sized Enterprises' (SMEs) may face difficulties when looking for first contacts, assessing the collaboration potentials and choosing the right opportunity. Such organisations are often unaware of partner search support tools and international networks. The task of finding suitable and trusted project partners can also be challenging due to a lack of managerial time, skills, lack of willingness in investing the necessary resources, lack of commitment i.e. local presence, cultural differences and knowledge to engage in international collaboration. More generally, even though collaboration often happens between partners who already know each other from previous collaborations, few existing contacts might not always be enough if businesses are looking for specific skills and knowledge for their project.

Secondly, the process of searching for international partners in order to engage in RTDI collaboration demands a certain awareness of the potential advantages to collaborate with foreign entities (businesses, research centers, universities…). There is therefore a need for EU and US researchers and entrepreneurs to more effectively identify the collaboration opportunities and value-added services offered on the other side of the Atlantic, sometimes more relevant for them than national opportunities. Awareness-raising activities about the benefits and opportunities for businesses to engage in transatlantic RTDI collaboration often result in a better knowledge of transatlantic potential partners, e.g. through international networks, transatlantic business and sectorial summits, and transatlantic inter-clustering actions[18]. Furthermore, getting knowledge on the US business landscape and market opportunities is key for internationalisation.

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[17]European Commission, C. W. Chapter: 5. Internationalisation of R&I. In J. S. report, RIO Country Report 2015: United States. 2016. p. 16

[18] inno TSD. Bilateral Coordination of the Enhancement and Development of S&T Partnerships between the European Union and the United States of America. 2015. Retrieved from http://v2.euussciencetechnology.eu/sites/default/files/Report%20on%20US%20subgrants%20to%20EU%20institutions.pdf

This project has received funding from the European Union's Horizon 2020
research and innovation programme under grant agreement No 733286.

To address this barrier, companies could participate in matchmaking sessions, trade missions and other networking activities that can serve as a tool to acquire relevant contacts and potential partnerships at an early stage. NearUS will offer numerous services to tackle this barrier, such as working visits and US 'innovation' tours, venture capital pitching events and a number of online tools that will help to identify opportunities and partners for collaboration with the US. By networking quality-certified innovation support players, through EBN & InBIA, and harnessing their individual strengths into a holistic innovation support ecosystem to respond more effectively to European SMEs and Innovators needs, NearUS fills the market gap for trusted internationalisation support partners and services. Moreover, offering isolated activities and services is not sufficient, and NearUS commits to offer continuous support services to those whom want to follow a process that leads to success.

- **Barriers related to project set-up**

After the collaboration has been established, the second step within the collaboration process is to set up common rules. Also, the most frequent problems that occur during this stage are usually related to funding needs, legal barriers and intellectual property rights.

First is the relative scarcity of supporting programmes, as "felt" by stakeholders (despite their reasonably high number in reality (already offered by certain EU countries to their constituents, or offered by specific US organisations, private of public, who propose services for "foreign" investment and trade, interstate included).

Second consists of the numerous difficulties for accessing US RTDI funding programmes for European businesses (since most of these support schemes are restricted to US businesses – or US owned businesses- except for some limited domains). Moreover, European organisations are often simply not aware of funding programs, and/or do not know how to respond to such calls. Besides this barrier analysed by BILAT USA 2.0 above, it can be mentioned that European organisations should start thinking about including internationalisation in the US within their "natural" budget, independently from funding programmes. This is a cultural change but doing so would get them closer to behave as the US entities do.

A third barrier specified by the BILAT USA 2.0 analysis lies in Intellectual Property Protection (IPR) issues. Agreeing on common definition of IPR rules is a sensitive issue, which can considerably hinder collaborations. The problems related to trade secrets, costs and procedures related to IPR namely pose a big obstacle for transatlantic collaborations.

Similarly, US and EU entities are sometimes granted with the right to "choose the applicable law", however associated requirements set-up by public authorities or funding programmes (e.g. Horizon 2020) are obligatory and not open to negotiation. For example, US organisations are reluctant to engage in EU programmes rules regarding the settlement of project disputes (which establishes European Community law prevalence in such a situation). Current developments substantially improve this situation: the European Commission and US Administration have in October 2016 agreed on an "Implementing Arrangement" which reduced the administrative barriers.[19]

[19]http://www.euussciencetechnology.eu/news/28/newly-signed-eu-us-arrangement-offers-new-opportunities-for-sti-cooperation

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To address these entry barriers, relevant EU & US stakeholders could attend trainings focusing on:

- "How to gather meaningful and up-to-date information on US Research, Technology, Development & Innovation (RTDI) funding programmes", which should improve European organization success rate in the US environment;

- Bilateral and regional free trade agreements (FTAs) that are being implemented and negotiated between the EU and the US, and that include Intellectual Property Rights (IPR) topics and regulations, thus improving common trust.

Some of the NearUS services that will help tackling these issues include IPR support services, boot camps for EU businesses that are ready for commercialisation in the US, various digital tools, training events providing information on markets, IP management, regulatory issues, cyber security, export/import control, etc. In addition, the "change of mindset" (aligning to a US mode of thinking that is driven by personal and private investment) would be an item many European organisations should consider on an individual basis.

3.3 Segmentation of target groups: Research, Innovation and Business

Taking into consideration the goals & barriers described above, NearUS focuses on developing EU-US connections across the three strands (tracks) of collaboration identified: Research2Research, Research2Market and Business2Business. This holistic approach is in line with the NearUS mission to strengthen the position of Europe as a world leader in science, technology and innovation.

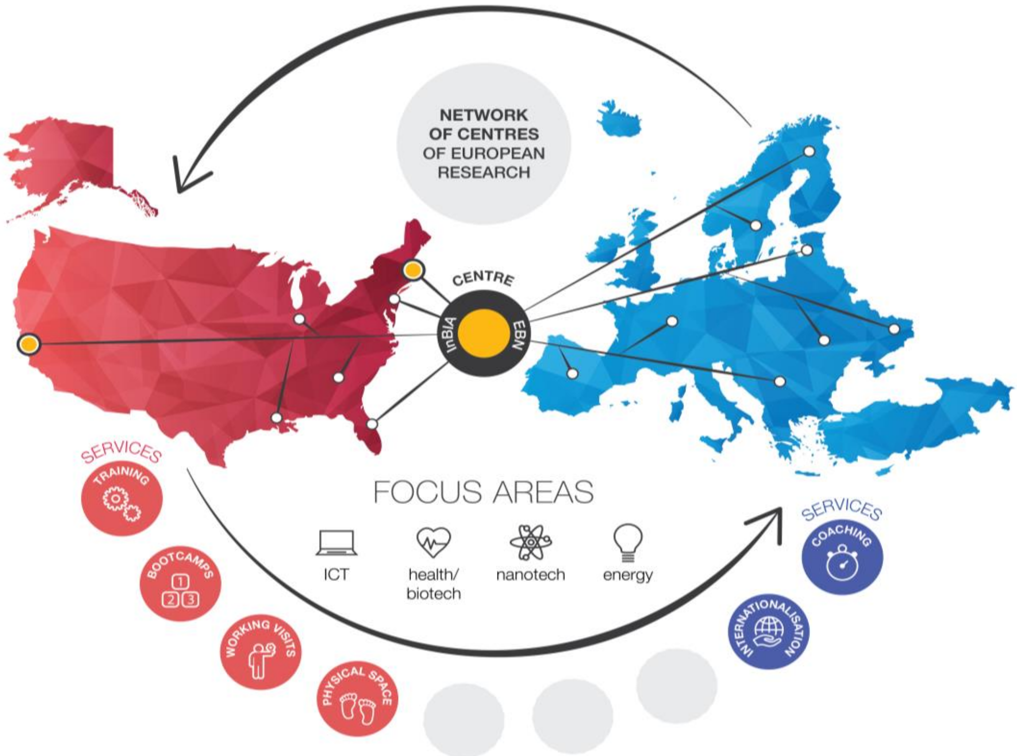

Figure 6: NearUS approach towards services

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Each strand corresponds to a target group of NearUS services, with a number of services encompassing all the three strands ("supporting" or "transversal" services).

3.3.1 Research to Research

The Network aims to foster R&I partnerships between EU and US universities and research organisations, bringing about in the long-term an EU-US R&I partnership based on the principles of inclusiveness and reciprocity. This strand's overall goal is thus to increase the visibility, prestige and competitiveness in the US of EU researchers.

NearUS will first develop pilot actions to assess how to better introduce EU researchers to the US research landscape by enabling them to better understand the funding opportunities already available in the US and the EU. It will also support the establishment of long-term scientific collaborations between EU and US research organisations making use of best practices.

Figure 7: Research to Research pilot support services

3.3.2 Research to Market

NearUS will be strongly committed to supporting the research to market process, supporting researchers in commercialising their scientific ideas in the US and finding investment partners to pitch their initial stage.

This strand includes both researchers who are looking to commercialise their research results, as well as innovative start-ups bringing new technologies or novel solutions to the market.

The range of services planned for this segment is summarised in Figure 8: Research to Market pilot support services.

Figure 8: Research to Market pilot support services

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3.3.3 Business to Business

Facilitating and enhancing internationalisation of EU businesses, products and R&I activities in the US is a main goal of the Network. To achieve this target, NearUS will provide high-quality, specialised business oriented services tailored to the needs of EU start-ups and SMEs and organise a comprehensive range of business matchmaking and connecting opportunities.

Figure 9: Business to business pilot supporting services

3.3.4 ‘Transversal’ supporting services

Beyond the customised services per strand (or track), NearUS further supports EU researchers, entrepreneurs and businesses with additional activities that are common to all targets.

Figure 10: Transversal pilot supporting services

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4 European Research and Innovation stakeholders' needs for support for accessing or expanding to the US

4.1 Respondents' profile

Statistics on respondents seeking support for their activities in the US

As described in chapter 2.1.2 Online survey – European stakeholders**Erreur ! Source du renvoi introuvable.**, 318 respondents are considered of relevance for this analysis.

61% (195) of the 318 respondents are "Public or Government owned" organisations, while only 23% (74) are "Private". In addition, 28% (90) marked themselves as "Non-profit" organisations, and 2% (7) belong to "Other" category. There are only minor deviations in the organisation sector of the 318 respondents compared to the responses of all 587 respondents of the survey: 2% less "Private" organisations seem to be interested, while 3% more "Non-Profit" organisations are more interested in the US.

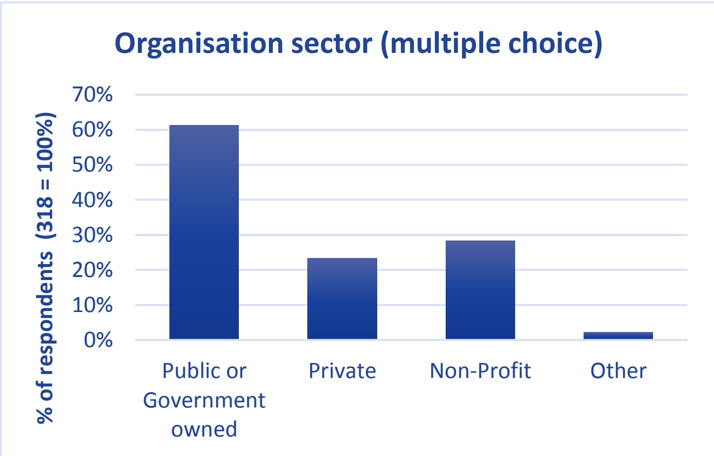

Figure 11: Organisation sector of respondents seeking support for their activities in the US

Regarding organisation type, 42% of participants are Research Organisations/ Institutions, 35% are Universities and 12% are SMEs. In the statistics of the 587 overall exploitable European responses, the % of Research organisations was 34%, Universities 32% and SMEs 13%. This means that a high proportion of research type organisations is interested in the US: 67% (134/199) out of the total amount of research organisations were interested in the US, 59% (110/187) out of all universities were interested in the US and 50% of all SMEs (38/76). This is most probably related to a high level of research in the US and thus high interest of the EU research community to the US research activities. It should be mentioned that this was a question allowing for multiple-choice answers, so most respondents selected several types of organisation.

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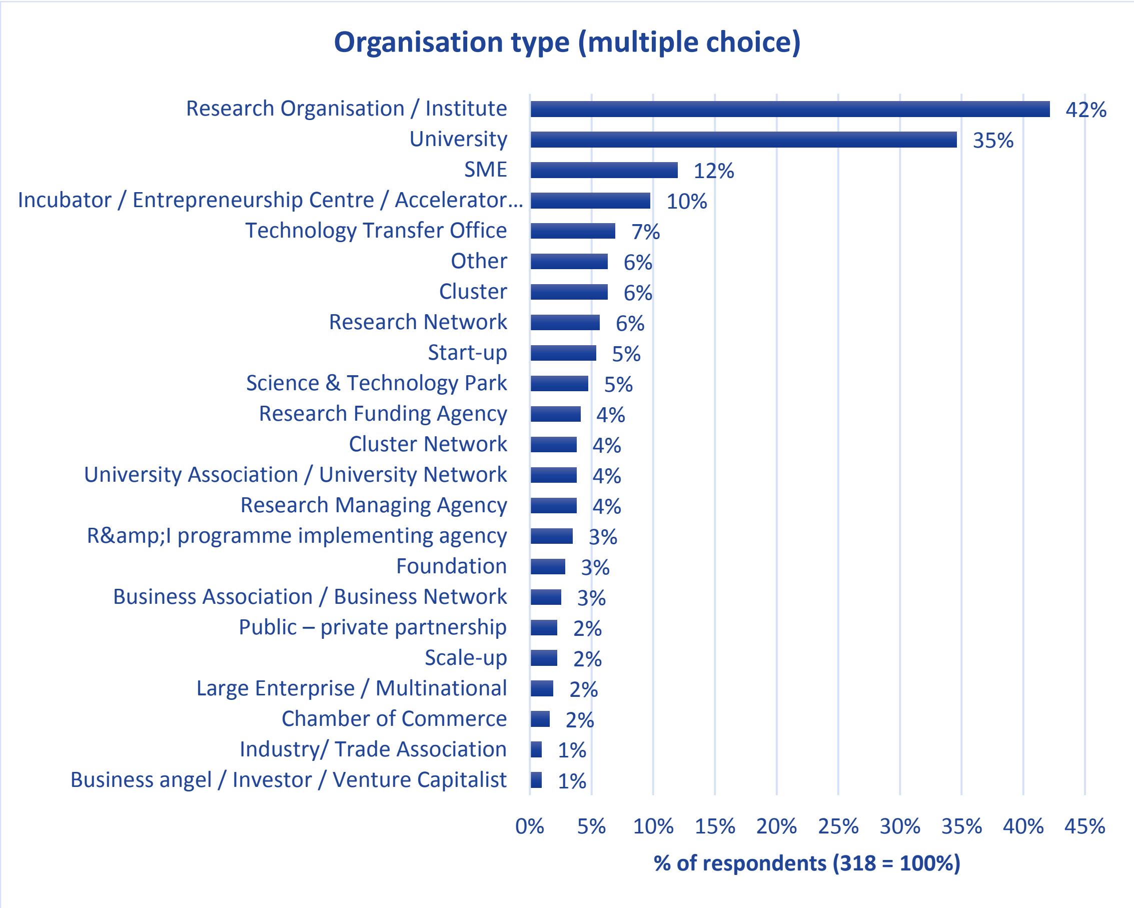

Figure 12: Types of organisations from respondents seeking support for their activities in the US

Respondents to the survey section relevant to this analysis come from 33 countries. The distribution among these show that 52 (16%) responses came from Germany, 47 (12%) from Austria, followed by 19 (6%) from Slovenia, 18 (6%) from Portugal, 18 (6%) from Spain, 17 (5%) from Belgium, 16 (5%) from Hungary, 13 (4%) from Poland and 10 (3%) from Bulgaria. This reflects of course the high dissemination of the online survey in these countries, but shows also interest in a Network and its services in the US from countries with more and less population, as well as from "innovation leaders" and "innovation followers" (according to the European Innovation Scoreboard[20]). This result seems thus not in line with the analysis results of the JELO study (see section 3); nevertheless, the proportion of answers per country in comparison to dissemination efforts per country would need to be taken into account for a more thorough conclusion on this matter, for both the JELO study and the NearUS analysis. Details on the dissemination databases per country are however not available due to confidentiality and data protection matters.

[20] http://ec.europa.eu/growth/industry/innovation/facts-figures/scoreboards_en

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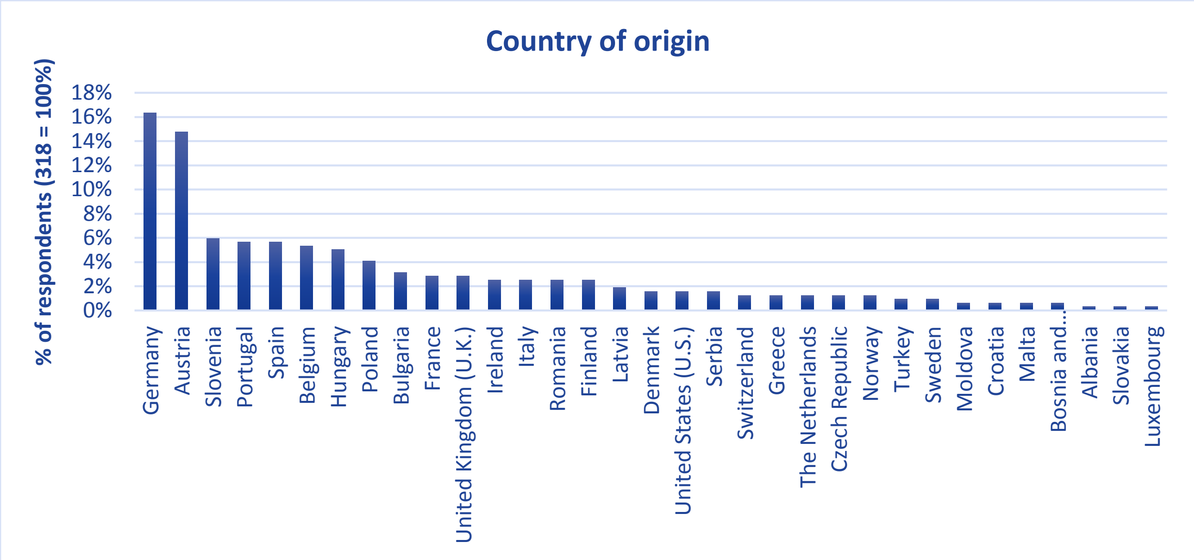

Figure 13: Survey respondents seeking support for their activities in the US

In absolute terms, the distribution of the countries of origin was nearly equivalent to those of the 587 respondents. However, in order to get a deeper insight and see how the numbers correspond in relative terms, the graph below was created. The number of respondents interested in support for collaboration with the US from a given country were divided by the total number of extractable entries from the same country (including those interested in expanding their activities to China/Brazil/ none of the 3 countries).

The number of all respondents per country (even those interested in expanding their activities to China or Brazil only) are included in this graph, and compared with the number of respondents interested in support for collaboration with the US.

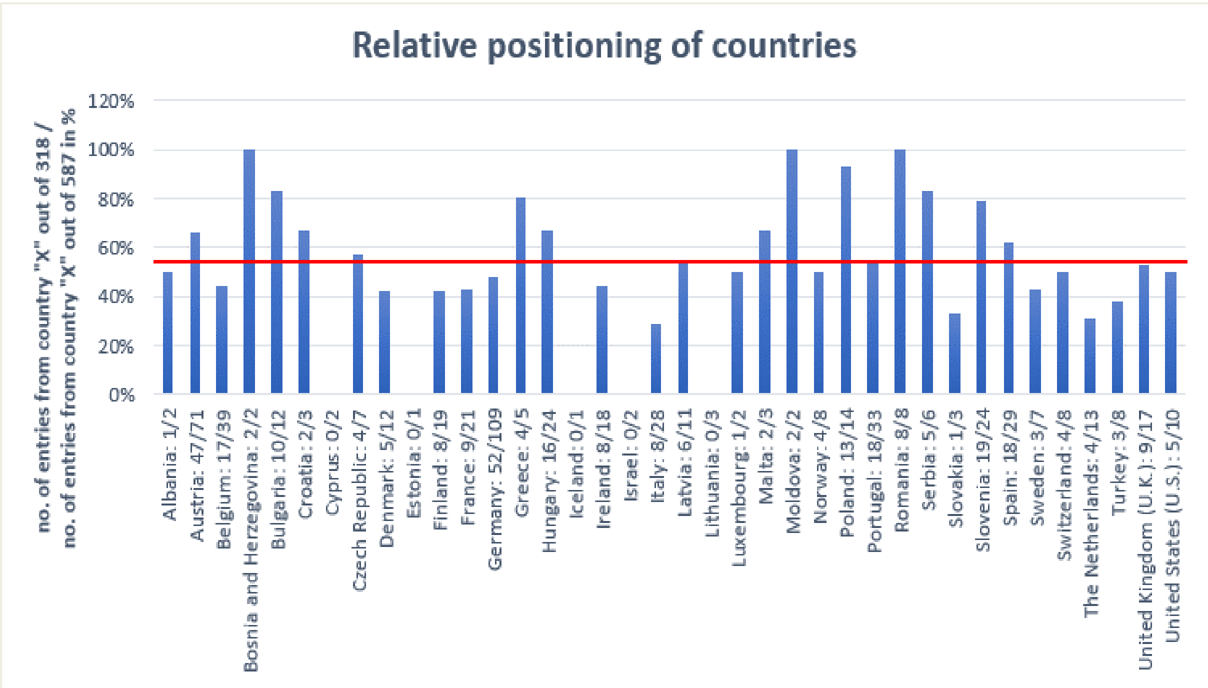

Figure 14: Relative provenance of stakeholders seeking support for their activities in the US*

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Comparing the countries of origin of respondents having shown interest in a European R&I Network of Centres in general (overall response rate to the survey in common with the two other projects) and the respondents having shown interest in support for collaboration in the US (data only regarding respondents having selected the US in the joint survey), a number of countries of origin stand out. Generally, it should be noted that samples of 25 answers per country seem necessary to be statistically significant, so conclusions provided here are indicative only.

One can see that countries like Italy and the Netherlands do not have “privileged’’ interest in the US e.g. only 8 out of all the 28 respondents from Italy were seeking for support in the US.

On the other hand, it appears that there is a strong need or demand from countries like Austria, Bulgaria, Czech Republic, Hungary, Poland, Romania, Serbia, Slovenia and Spain - that are above the red line of 54% (318/587), thus are relatively more interested in support for collaboration with the US. Poland and Romania appear to be outliers where demand is particularly high, with 13 out of 14 respondents from Poland and 8 out of 8 from Romania indicating the need for support to collaborate with the US. In the cases of Bosnia and Herzegovina, Croatia, Greece and Moldova this statement cannot be considered as significant due to the few responses.

The results of the STI JELO survey previously suggested that an STI JELO in the US would particularly benefit less populous EU countries, such as Serbia, Croatia, Slovenia, Hungary, Slovakia, Luxemburg, and that there is presumably less need for a European office in more populous EU countries, such as Germany and France, that may already have their own national support structures. The findings of the NearUS survey shows a high interest amongst less populated EU countries (especially in the Eastern European region) as well as many ‘populous EU countries’, such as Germany, Poland and Spain.

Thus, the author finds no evidence that there is a correlation between population size and need for support services in the US as such. Based on the survey results (even though these results may partially stem from uneven dissemination efforts), the highest demand comes from Eastern-European countries that in many cases do not have strong national support structures, as well as from Western European innovation actors, notably Germany and Austria, or Belgium, Ireland, Spain, Portugal and France. On the other hand, it seems some of the top European innovation leaders (Scandinavian countries, the Netherlands and Switzerland[21]), as well as the Baltic countries were generally less responsive to the survey and the US.

The following segmentations have been observed regarding the potential target customers for NearUS support services:

The majority of Eastern European countries, namely Bosnia Herzegovina (2/2), Bulgaria (10/12), Croatia (2/3), Czech Republic (4/7), Hungary (16/24), Moldova (2/2), Poland (13/14), Romania (8/8), Serbia (5/6), Slovenia (19/24) seem to be highly interested in developing activities in the US. While in absolute terms, there were not always that many respondents, in relative terms these countries are above the red line in **Erreur ! Source du renvoi introuvable.** so out of all those who responded to the survey from these countries, most were interested in the US. There were 102 survey respondents in total from these countries, out of which 81 were interested in support for US.

[21] http://ec.europa.eu/growth/industry/innovation/facts-figures/scoreboards_en

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Germany and Austria are highly interested in international collaborations in general, and in collaboration with the US in particular (US is the most popular destination for them between China, Brazil and US. Out of 180 respondents in total from these 2 countries, 128 were interested in the US, and 99 were seeking for support. 60% of the 99 respondents were public organisations, many in the fields of ICT and Human Health Services.

Other Western European countries expressed relatively high interest: Portugal, Spain, Belgium, France, UK, Finland, Ireland and Denmark. In absolute terms, there is a high number of entries from these countries, signalling that they are highly interested in international collaborations, and are in need of support regarding collaboration with the US. Spain notably scored highest with 18 out of a total of 29 respondents looking for support in the US. Portugal and the UK are both above 50%, Belgium, Ireland, France, Finland and Denmark are around 40%.

Interestingly, there was quite a high survey response rate from Italy (28) and the Netherlands (13), however only 8 Italian and 4 Dutch organisations express need for support in the US

There was a low survey response rate from Sweden, Norway, Turkey, Latvia, Switzerland, Albania, Greece, Malta and Slovakia. The response rate from Cyprus, Estonia, Iceland, Israel and Lithuania is considered as negligible in this analysis.

Regarding the thematic area of the 318 respondents, 50% (159) of the organisations are involved in ICT, 40% (128) in Human health and social work activities. Since these are the 2 most popular fields, more details are revealed about them below.

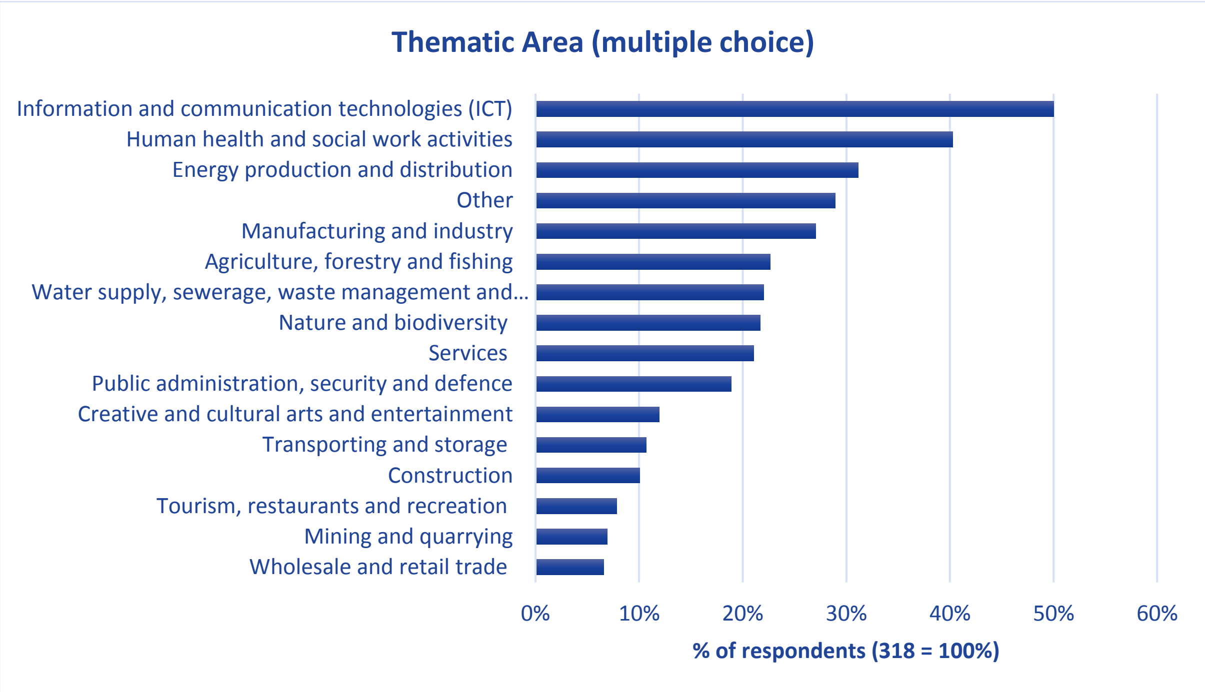

Figure 15: Thematic areas of respondents interested in the US

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Interestingly, respondents are working on thematic areas that are in line with EU priorities concerning the EU-US R&I strategy[22]. Indeed, 66% of the organisations involved in 'ICT' are public, 21% private and most of them are research organisations or universities. 26 of them are from Germany, 20 from Austria, 11 from Belgium, 10 from Spain, 7 from Slovenia. Below the subfields within ICT are displayed: most respondents are involved in computer programming/ consultancy or information service activities.

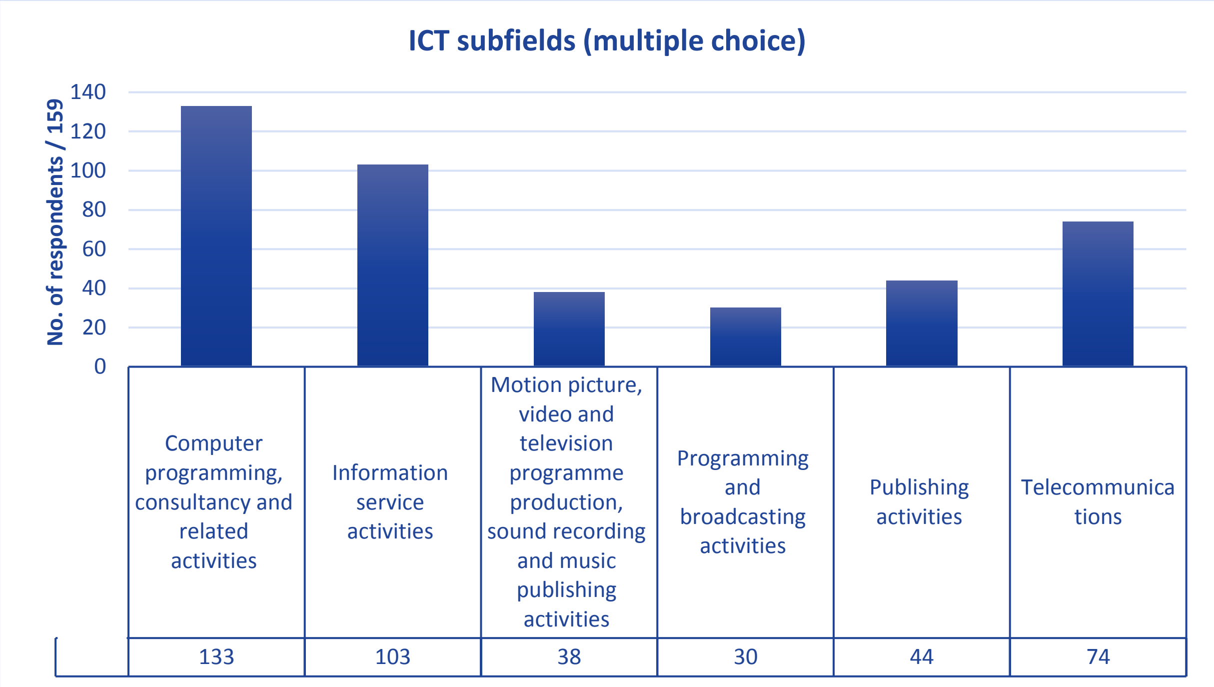

Figure 16: ICT subfields

[22] European Commission. Roadmap for EU - USA S&T cooperation. 2016. Retrieved from http://ec.europa.eu/research/iscp/pdf/policy/roadmaps_usa-2016.pdf#view=fit&pagemode=none

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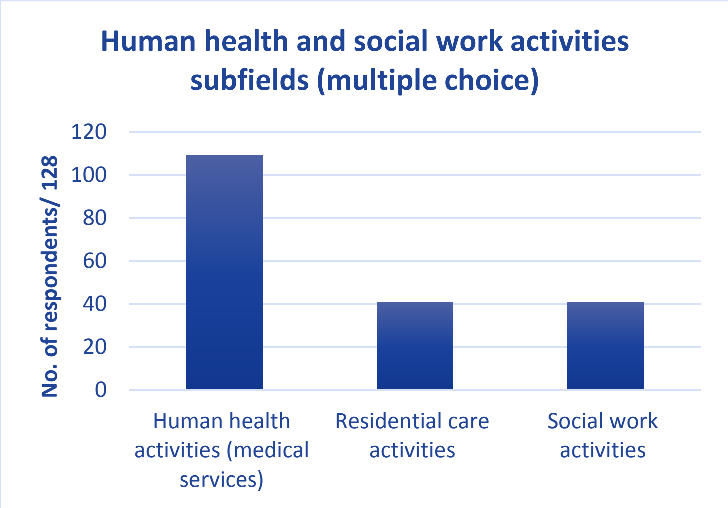

Figure 17: Human health and social work activities subfields

74% of organisations involved in 'Human health and social work activities' are public, and only 13% are private, with most (around 45%) marking themselves as either research organisations or universities, or both. 28 of them are from Germany, 15 from Austria, 13 from Spain, 10 from Belgium and 7 from Poland. Most of them (109) are providing medical services, and only the minority (41 respectively) is involved in residential care or social work activities in Research to Research – Collaborations opportunities for European and US researchers.

In the following sections, 4.2 Needs in Research to Research, 4.3 Needs in Research to Market and 4.4 Needs in Business to Business, respondents' profile statistics are reviewed for each strand specifically, outlining any notable differences compared to 318 respondents' profile statistics. Within each strand, these general respondents' profile statistics are followed by the services. It is important to note that if there is nothing mentioned about the respondents' profile in a given service (or a particular aspect, such as % of public organisations), it means that there was no significant deviation in % terms from the given strand respondents' profile statistics, thus the respondents' profile for the given service is in line with the strand statistics. However, if there is a significant deviation in % terms or change in order (significant deviation was marked at -/+ 5%), this is always mentioned either with text and/or graph where deviations are marked with red, e.g. for the IPR support service in the R2R stream it is mentioned that the % of organisations involved in ICT is 62%, whereas in the R2R strand statistics it is only 51% (while the % of organisations involved in Manufacturing and industry, stayed within the -/+5% limit, thus does not need to be mentioned). Similarly, it was mentioned that there is a high percentage of French respondents who "jumped" higher up the list in the distribution of countries.

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 733286.

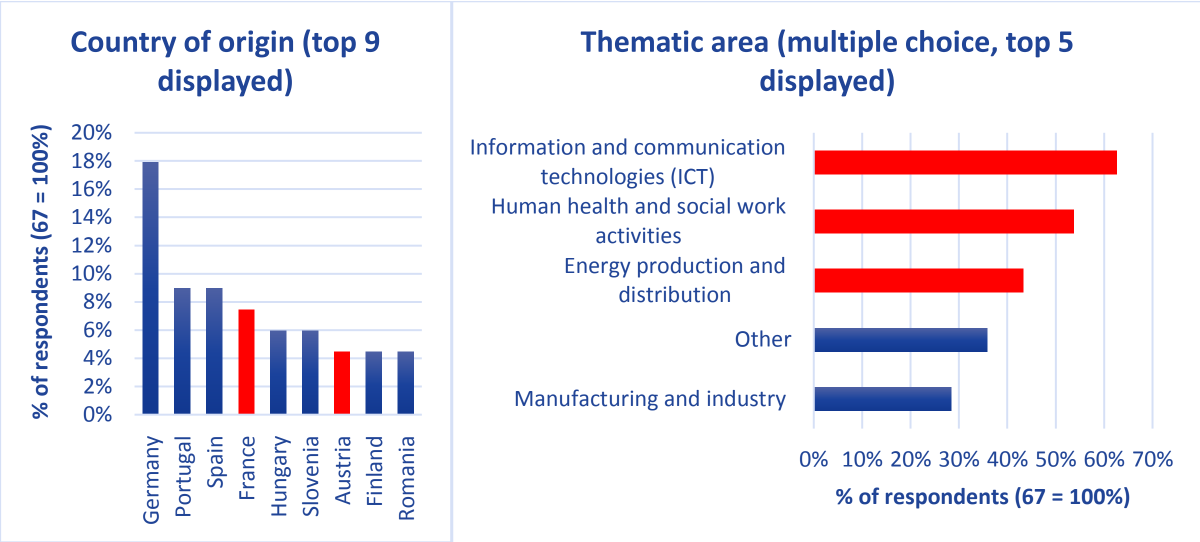

***Figure 18:** IPR services; explanation for statistics*

Overview of interviewees seeking support for their activities in the US

During the interviews, the respondents mentioned several services that should be taken into consideration for defining the NearUS Network's offer to its clients. Within this context, this section highlights some of the main services suggested by the interviewees on the centre's potential offering.

Some interviewees highlighted the importance of the big internal market of the US as one of the main reasons to develop international R&I activities in the country. The US represents a large market with research actions and innovative products being strongly developed. This provides an opportunity for EU organisations, namely for the B2B and R2M groups, as these organisations can explore the high value of the US American market. It is also important to note that some interviewees pointed to current political tensions in the US as a potential risk factor for establishing new cooperation opportunities on R&I.

Whether they currently have activities in the US or not, interviewees agree on the key incentives that attract researchers and businesses to the country. They consider the US as the largest technology market with high-level know-how that favours the forging of technology and economically sound partnerships. Performing activities in the US provides new opportunities for companies and organisations to gain experience, new ideas, knowledge and valuable contacts. Therefore, most interviewees consider their ties with the US can be enlarged and broadened.

Since the US market is a highly innovative and therefore competitive scene, it can have a positive effect on companies and research organisations that are ready to learn and adapt to higher expectation levels, which can lead to additional growth.

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 733286.

4.2 Needs in Research to Research - Collaboration opportunities for European and US academics

4.2.1 Services identified and survey stats

Research to Research – general statistics

To the question "Among the following key services of the European Research and Innovation Centre, which one would you be interested in?", 203 respondents clicked on "R2R: Key services supporting research relations between individuals from at least two research organisations". Thus, the basis for the graphs below is taken as 203 respondents.

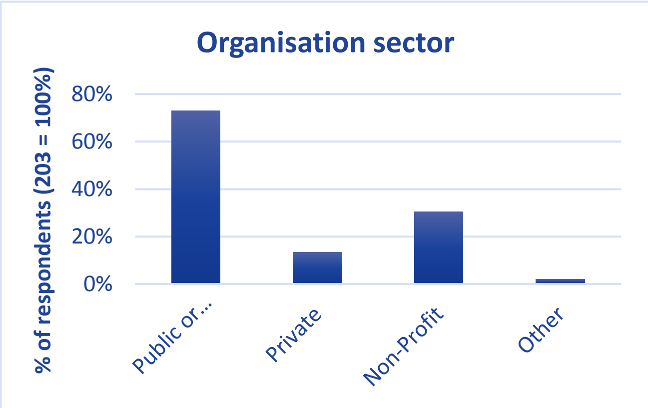

Figure 19: Organisation sector of respondents interested in this strand

73% (148) marked themselves as a "Public or Government owned", 13% (27) as "Private", 31% (62) as "Non-Profit", and 2% (4) as "Other". Thus, there are 12% more Public organisations and 10% less private in comparison to statistics on respondents seeking support for their activities in the U.S (which encompass all strands). It must be noted that these were multiple choice questions. Logically, 54% (110) of the interested respondents are Research Organisations/Institutes and 42% are Universities, which is respectively 12% and 7% higher than of the general statistics. To be noted, few SME's and Start-ups are interested in this strand. This is not a surprising result since the activities' and services' focus is on research organisations and universities.

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 733286.

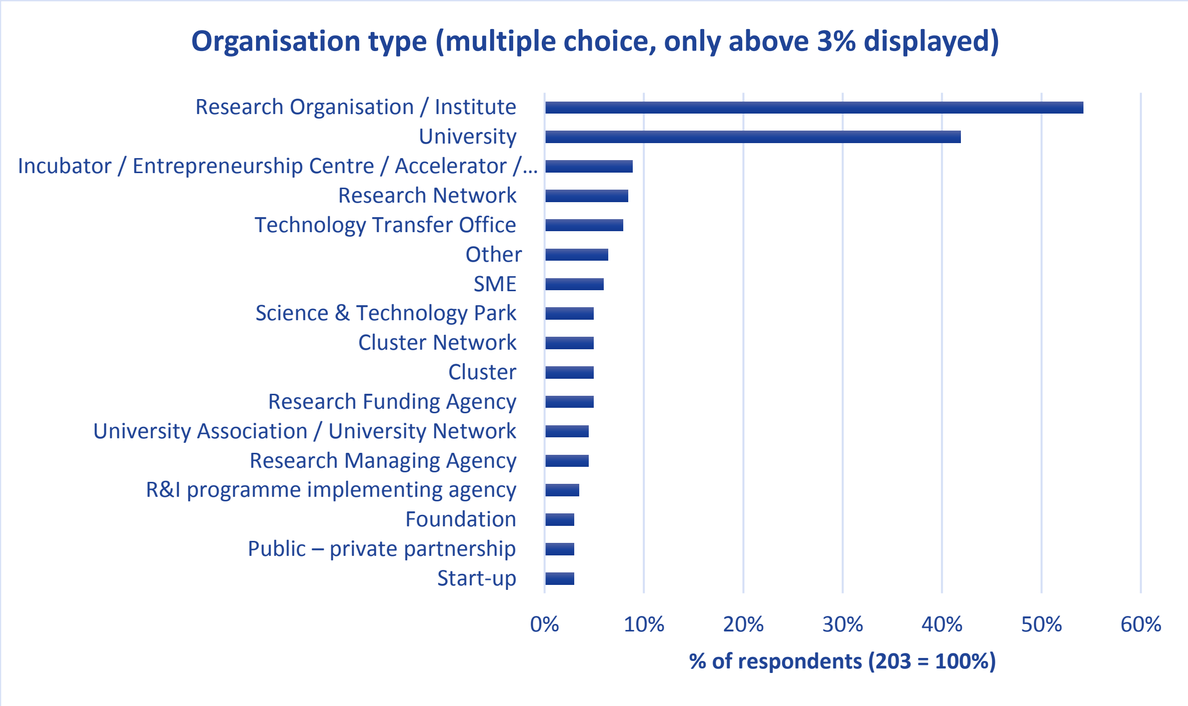

Figure 20: R2R - Organisation types

The general distribution of the countries of origin does not show significant deviations from the general trend. Germany, Poland and Romania seem to be slightly more interested in R2R services, while Hungary and Slovenia somewhat less interested.

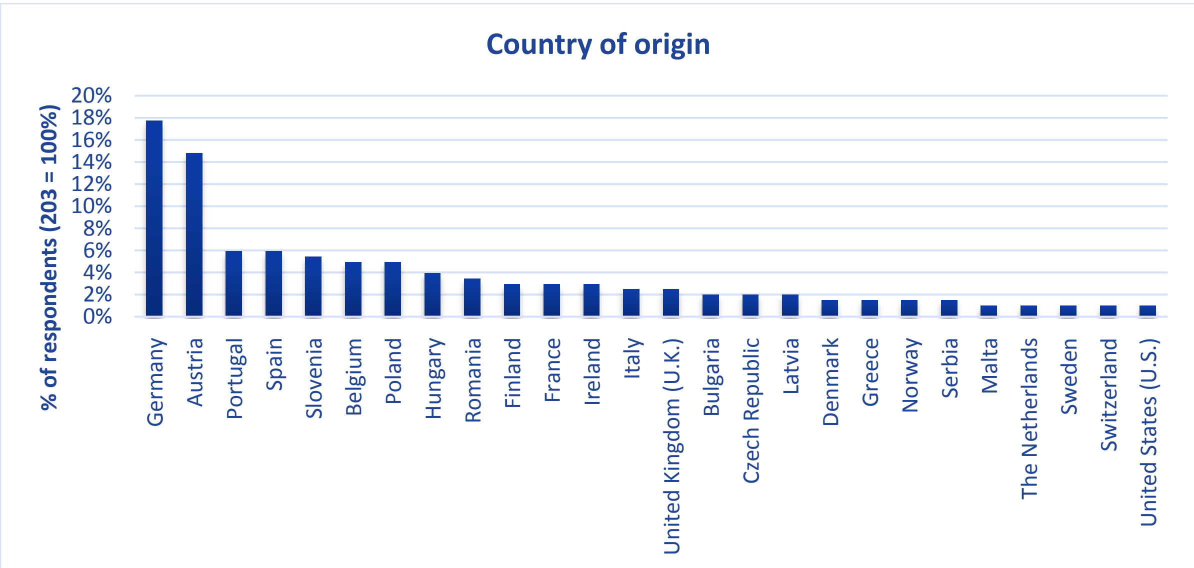

Figure 21: R2R- Country of origin

The thematic areas tackled by R2R 203 respondents is almost the same as for the 318 respondents. “Nature and biodiversity” and “Public administration, security and defence” ranking slightly higher up the list. There are also relatively more organisations involved in Human health and social work services.

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Interestingly, 25% of respondents are already engaged in activities in the US This could impact the format of the R2R services. The localisation of the services is of importance for these EU stakeholders as well as the service providers. Travel costs are of importance for the delivery of various R2R services. Should the respondents already have a presence in the US, it could impact on the format of its delivery.

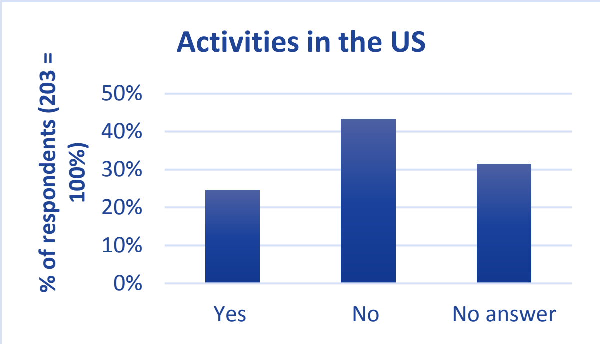

Figure 22: R2R organisations responses to the question "Do you already have activities in the US?"

The table below presents the interest in various R2R services by respondents having selected this strand. “Access to US-based research conferences” was the most popular service with 170 interested respondents, while “Media promotion service” was the least popular one with 35 respondents (this service is analysed in section 5.4 regarding “transversial services”).

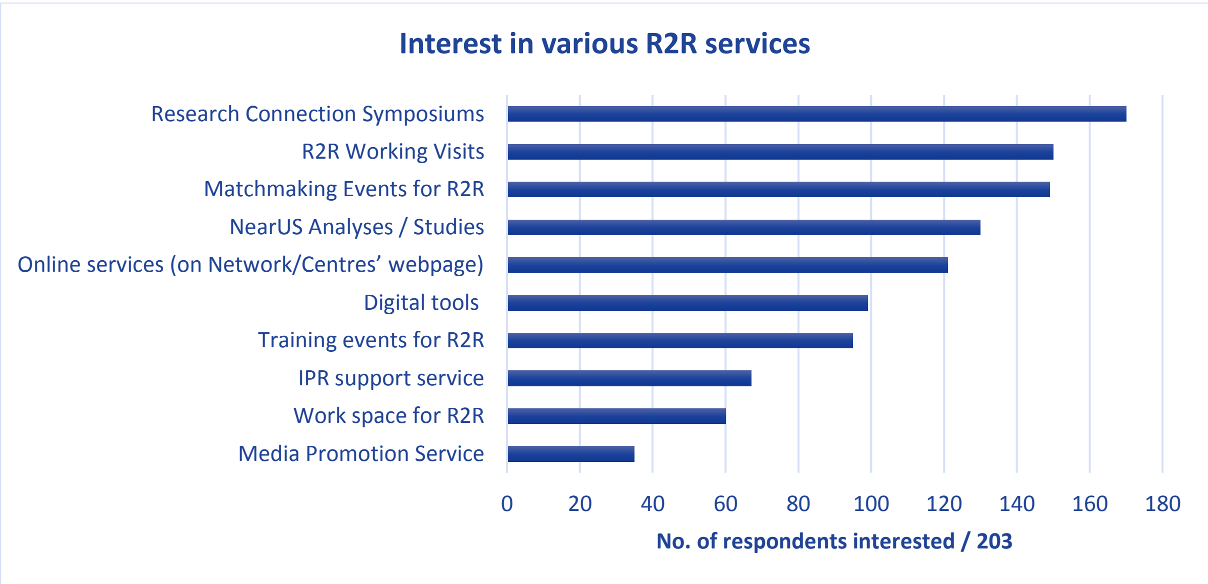

Figure 23: Interests of respondents in NearUS R2R services

R2R strand - analysis per services

Research Connection Symposiums

In total, 170 respondents expressed interest in this service, named ‘Access to US-based research conferences and other large-scale networking opportunities for fostering potential research collaborations between EU and US researchers / research managers’ in the survey. Organisation sectorial & country distribution for this service are in line with the general R2R statistics: 56% (95) of the interested respondents are Research Organisations/Institutes, and Universities are ranking second with 41%.

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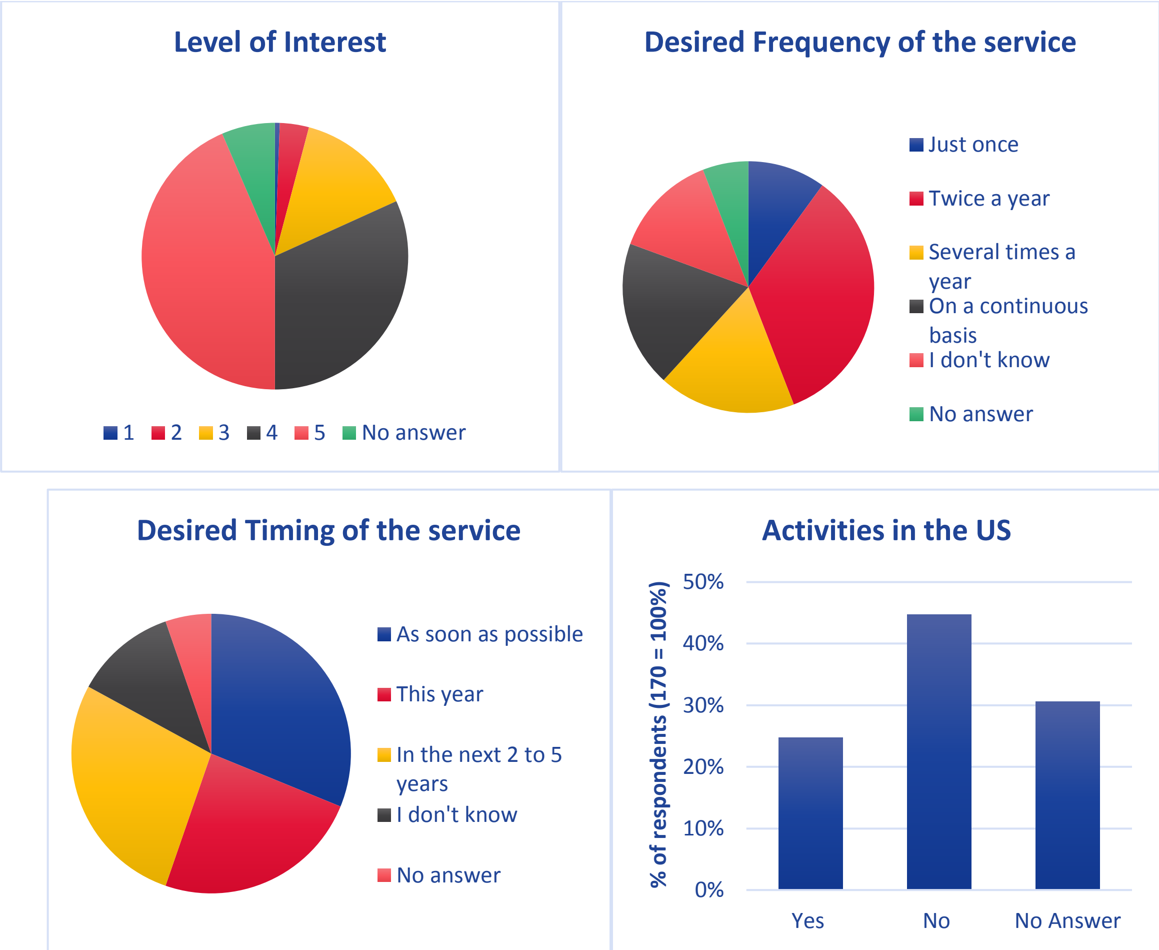

Figure 24: Research connection symposium survey answer details

About three quarters of the respondents (128/170) are very interested in the service (Level of interest marked as 4 or 5). Regarding the frequency of the service, the results are more balanced, the most popular answer (58/170) being "Twice a year", followed by "on a continuous basis". Thus, the long-term demand for this service is to be considered in the long run: the service should be formatted so that, if not the service, the relationship with the 'customer' is continuous in time. Amongst the 31 most interested respondents (marking 5 as level of interest and wanting to use the service often and soon) the most frequently occurring countries of origin of the organisations were the following: Portugal (4), Romania (4), Germany (3) and Spain (3), and most of these 31 organisations were public research related organisations.

Responses are more diverse regarding the timing for the launch of this service. Most respondents (53/170) would like the service to be available as soon as possible, while 67 prefer accessing it in the next 2 to 5 years or "do not know".

Matchmaking Events for R2R

In total, 149 respondents expressed interest in the service named as 'Matchmaking / connecting events within research conferences for European researchers looking for partnering opportunities in the US' in the survey. The organisation type is in line with the overall R2R statistics, with a slightly higher percentage of Research Networks and SMEs. Same is observed about thematic areas, except that the proportion of organisations that are active in

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ICT (54%) and Human health activities (52%, that is 6% more) is higher than in the general statistics.

The level of interest is identical to the previous service – it could be an option to combine these two services and organise a matchmaking at a Research Connection Symposium. The frequency of the service results is more diverse, 49% of the customers wanting to attend matchmaking/ connecting events either once or twice a year, 20% on a continuous basis and 14% several times a year. It is to be noted that 61% of the respondents would like the service to be available either as soon as possible or this year, which suggests that there is a high demand for this service to become available within a brief period of time. The 30 most interested respondents were mostly from Romania (5), Germany (4), Portugal (4), Spain (4) and Hungary (3).

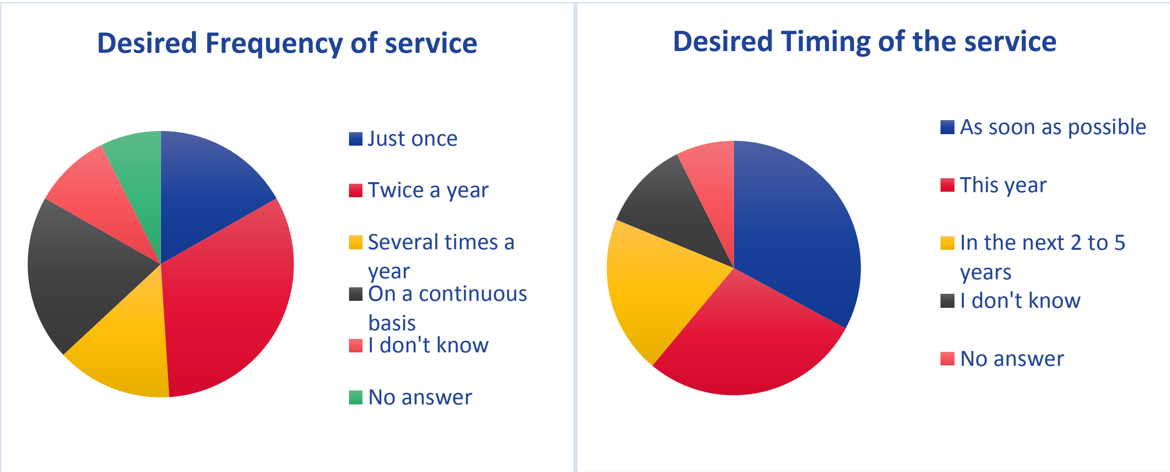

Figure 25: R2R - Matchmaking events - timing & frequency answers

Conclusion: Research connection symposiums and other large-scale networking opportunities

Overall, it can be concluded that accessing Research Connection Symposium is the most popular R2R service (170/203) in Research Conferences and other large-scale networking opportunities. The majority of the 170 respondents are from the Public sector, working in Research Organisations and Universities. Thus, the format of the service, notably its billing process, needs to be considered. Most of the respondents are involved in Human Health and ICT thematic areas, thus confirming BILAT US 2.0 and BILAT US 4.0 project developments as well as the need to further develop services for such stakeholders. These results are also in line with the general R2R results. Most respondents are highly interested and ready to require the service on a frequent basis.

The interest in Matchmaking events is also high (149/203), ranking third out of all the R2R services. The majority (104) of the respondents is highly interested in the service and about half of them would like to participate in matchmaking/ connecting events only once or twice a year, while about one third would prefer to access such events more often than that. Thus, the demand associated to this service is to be considered in the long run: the service should be formatted so that, if not the service, the relationship with the 'customer' is continuous in time. 61% of the respondents would like the service to become available soon. A quarter of the respondents are already active in the US which is an important aspect when considering travel costs to such events.

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IPR support service

67 respondents are interested in this service, named ‘Access to US-based intellectual property assets from research institutions for potential acquisition of new IP and/or potential licensing of European technologies out to US entities’ in the survey[23].

A relatively high amount of Research organisations is interested in this service, as well as an unusually high proportion of French entries. Regarding thematic areas, the share of organisations involved in ICT is above the general percentage by 12%, Human Health services by 8%, and Energy Production by 10%.
The red colour in the graph below shows deviation of more than -/+ 5% from the R2R strand statistics.

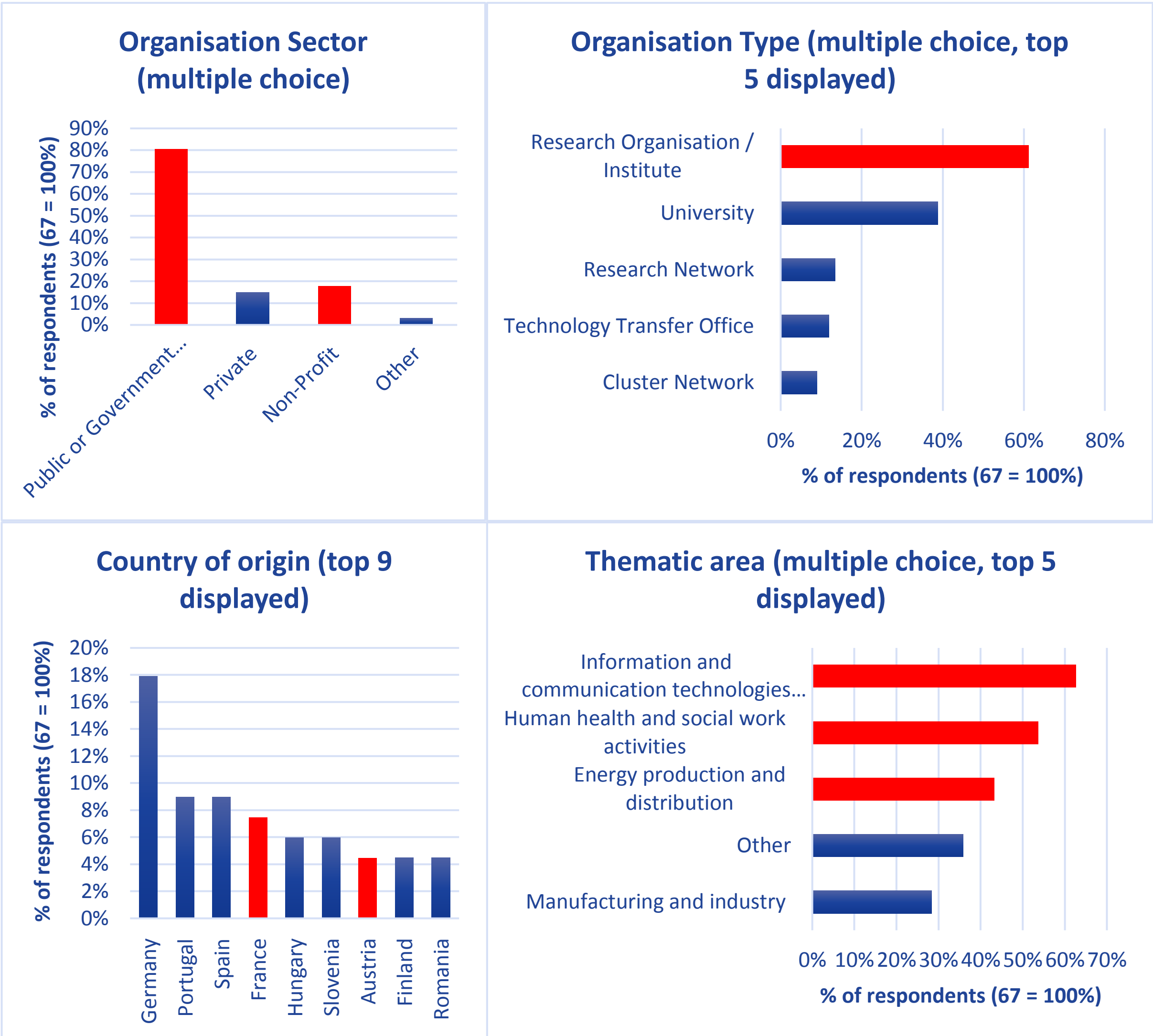

Figure 26: R2R IPR support survey answer details

[23] This service isn't yet among the portfolio of R2R services foreseen within the NearUS project. However, it is considered as potential add-on service to be provided in a next step of the project by the partners in charge of their potential sevice developments

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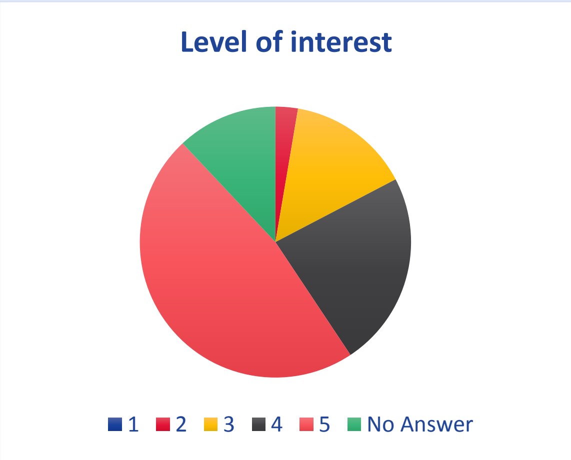
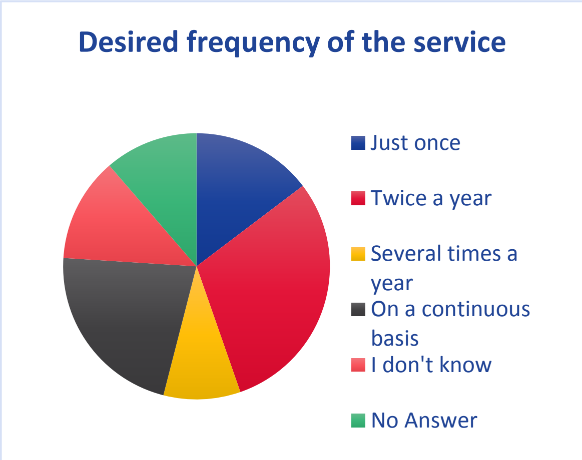
The level of interest varies among the respondents, showing that for many it might not be the most crucial service of interest, however almost 50% of overall respondents still being highly interested in it. The respondents also expressed very diverse opinions regarding the level the frequency, as well as timing of the service. Also, to mention, many of the respondents already have activities in the US. Amongst the 15 most interested respondents (5 marked as level of interest, and wanting to use the service soon and on a frequent basis, there were 3 organisations from Portugal and Germany respectively, and 2 from Hungary and Spain respectively. Again, most of these 15 organisations are research-oriented public sector organisations.

R2R Working visits[24]

Overall 150 respondents were interested in the service named as 'Group working visits for European researchers interested in establishing a long-term collaboration with the US' in the survey, making it the 2nd most popular among all the R2R services. The distribution of the organisation sector, organisation type, country of origin and thematic area of the respondents is in line with the R2R general statistics.

71% of the respondents are highly interested in this service while the other questions do not provide any clear trends. 27% of the respondents already have an activity in the US, therefore it can be assumed that these potential clients could combine travel to other activities in the US.





[24] This service is not yet among the portfolio of R2R services foreseen within NearUS project. However, it is considered as potential add-on service to be provided in a subsequent step of the project.

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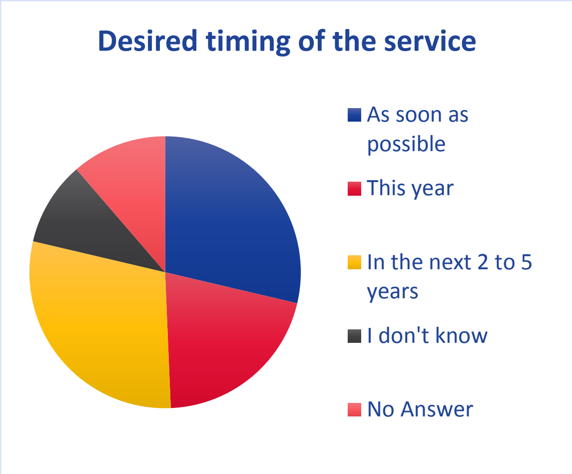

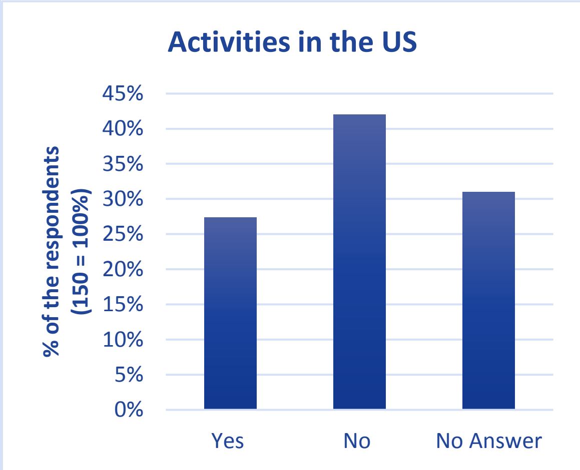

Figure 27: R2R Working visits survey answer details

Conclusion: IPR services and R2R working visits, to be further explored

The response rate to the IPR service was not very high (67 /203) but the service proves to be relevant to Public Research organisations and Universities from the ICT/ Health Sector which revealed themselves as primary targets. The results are inconclusive, suggesting that this service may not be a priority for the respondents, or that they are not sure how they want to take advantage of this service.

R2R working visits are the second most demanded service within the R2R strand. The majority of the 150 respondents are highly interested. The answers are diverse regarding the frequency and timing of the service, signalling that the potential customers have diverse needs, thus further defining the contents with the stakeholders concerned is needed.

Both these services, unforeseen in NearUS' primary workplan, do show potential for end-users, in particular the working visits, and should be considered for further project developments, notably through the pilot services' implementation.

NearUS Analyses / Studies

130 respondents are interested in this service, named as 'Guidelines and information on the US-research landscape, list of key-contacts, etc. facilitating collaboration with US counterparts', making it the 4th most demanded service in the R2R stream. There is no significant deviation compared to the general R2R statistics, the only one worth mentioning is a 6% increase in organisations that are involved in Human health and social work activities. Thus, a total of 52% (68/130) of respondents that are interested in this service are involved in fields related to human health. If a sector focus is chosen for one of the studies, this aspect should be taken into account.

The level of interest for this service is exceptionally high: 46% marked it as "5", meaning they are largely interested in it, no one marked "1" and only two respondents chose "2" as a level of interest.
Similarly, as much as 60% of respondents signalled that they would like to get access to the service as soon as possible or this year.

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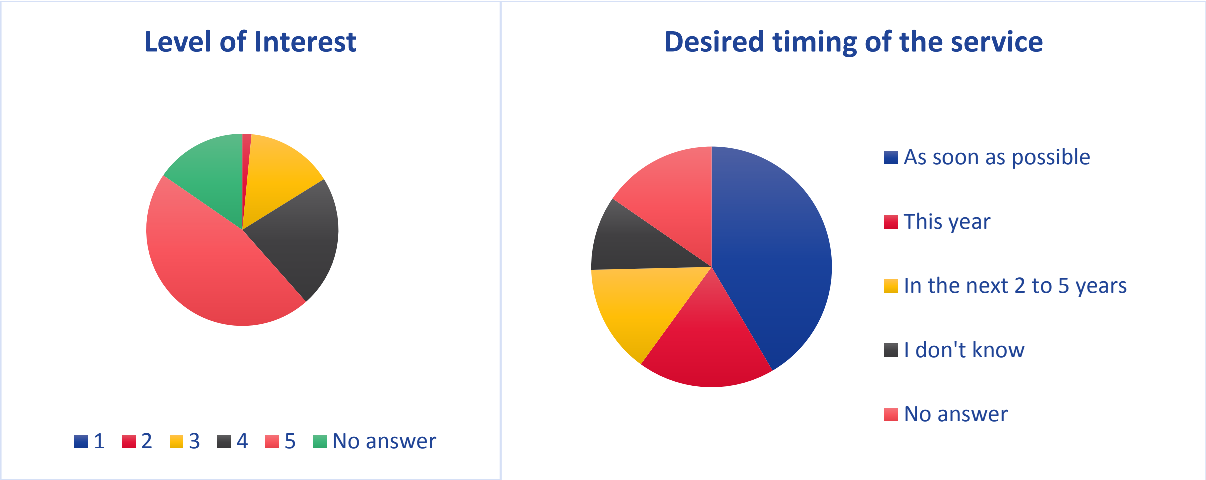

Figure 28: Analysis/Studies survey answer details

Conclusion: NearUS Analyses / Studies

The response rate for this service was high (130 /203) and most of the 130 respondents are also unusually highly interested and would like the service to become available soon, showing clearly that there is a high demand for it. A sector-focus should be considered.

4.2.2 Interview elements

Different opinions and inputs were received from the interviewees under this thematic. Some interviewees stated that the most relevant supporting schemes for going international for market and/or R&I collaboration were the H2020 open calls and tenders, specifically for R2R actions. On the other hand, some respondents considered that R2R actions should use bilateral cooperation programmes between the EU and the US. However, it was noted that these bilateral programmes should be feasible and perceive the financing of both sides at the right timing, which is a key point for success. Furthermore, some interviewees pointed that government funding is also used, mainly to help companies in accessing international training and participating in missions to the US. It should be noted that promotion of access opportunities in H2020 and US programmes and collaboration partnerships on this basis are a main focus of other initiatives, namely the BILAT US 4.0 project, and not in the scope of NearUS. This aspect of interview results should thus not be considered in NearUS services development to avoid overlapping with the initiatives, which focus on these aspects.

To be noted, a European national institute fostering scientific collaboration with the US by providing networking contacts and methods to researchers, academics, students and policy makers, mentioned two additional themes that NearUS should consider: better identify “small” and flexible grants fostering scientific collaboration between EU & US stakeholders and foster academic collaboration between the EU and US, notably by facilitating the mobility of US researchers towards the EU.,Here again it should first be considered if such activity is not already covered by other initiatives, notably also in the context of Marie Skłodowska-Curie actions.[25]

[25] https://ec.europa.eu/programmes/horizon2020/en/h2020-section/marie-sklodowska-curie-actions

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This need is shared by another stakeholder from a research council. This organisation, financing basic and applied research, supports the implementation of the national research policy and is familiar with EU instruments for international cooperation (ERA-NET, JPI etc.); The interviewee underlined the fact that there is a significant demand for additional funding, as the present scale of funding is insufficient in all areas of R&I cooperation, including basic and applied research.

4.2.3 Synthesis of the segment and its interest in R2R services

64% respondents of the survey identified R2R as their strand of interest. Most responses came from Germany, Austria, Portugal and Spain. In relative terms however, Germany, Poland and Romania seem to be slightly more interested in R2R services, while Hungary and Slovenia somewhat less interested. The table below presents the different services, ranked according to the interest they generate among R2R stakeholders.

Table 4: R2R services ranking and associated remarks

Rank	Service	Stakeholder types interested	Remark
1	Research connection symposium	Research Organisations / Institutes and Universities	Need to be tailored in the frame of a ‘continuous’ customer service
2	Working visits	All R2R stakeholders	About three fourth of R2R respondents are interested in this service that was not foreseen in NearUS’ initial plan. Thus, exploring this potential offer is recommended. Answers diversity, though, underlines the need to define contents with potential stakeholders as a lean approach.
3	Matchmaking events	Research Organisations / Institutes / Networks, Universities and SMEs	In line with the Research Connection Symposium analysis, the opportunity to attend matchmaking events should be tailored in the frame of a ‘continuous’ customer service, to which customers would apply one to two times a year
4	IPR support service	Research organisations	Many potential customers already have activities in the US, thus this service could be provided within this country.
5	Analyses / Studies	All R2R stakeholders	Focus to be privileged: ICT, health and e-health, Energy. Content of interest: research and business contacts and funding opportunities

To be noted, devoting fractions of R2R services to funding opportunities seems to be an essential factor of NearUS R2R value proposition. The provision of information on H2020 open calls and tenders, bilateral cooperation programmes and any “small” and flexible grants sources fostering scientific collaboration between EU & US stakeholders is apparently a widespread need. Nevertheless, as noted, this activity is in the heart of the BILAT US 4.0 initiative and synergies could here be exploited instead of creating overlap of activities.

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4.3 Needs in Research to Market - Services towards researchers willing to commercialise their ideas in the US

4.3.1 Services identified and survey stats

Research to Market – general statistics

To the question "Among the following key services of the European Research and Innovation Centre, which one would you be interested in?", 190 respondents clicked on "R2M": Key services supporting relations between individuals from research organisations and companies.

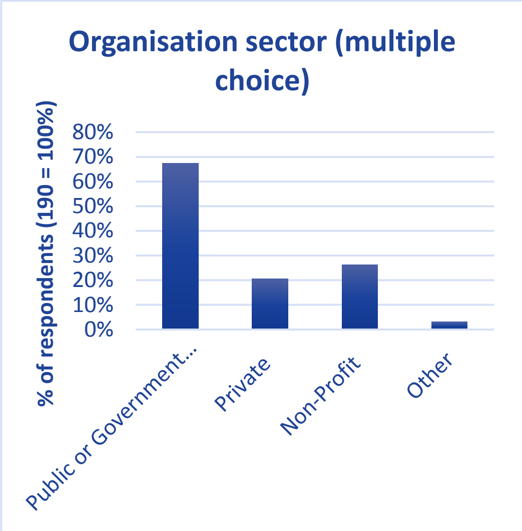

Figure 29: R2M Organisation sector

The organisation sector of the respondents is fairly similar to the general statistics of 318 respondents, with slightly more Public or Government owned organisations and less Non-Profits. Regarding organisation type, 43% (82) are research organisations, 38% universities and 12% SMEs. Again, this is almost identical to the general trend: more SMEs and less research organisations are interested in R2M type of services than in R2R services, which is not surprising. Also, it is possible that the Start-up respondents considered that they should rather answer the "Business to Business" set of questions, thus lowering the number of answers in the R2M strand. Most R2M services are initially planned for research-intensive start-ups/spin-offs that are already incorporated or are on the way to this (for example, the R2M Boot camp planned criteria is that if the company is not incorporated yet, it should already have a founder and IP ready to go). However, the interest for the services come especially from public research organisations. Thus, the target group for this strand or for some services of this strand might need to be reconsidered, in order to avoid low application numbers for some services. For example, an option could be to open the call for broader target groups, based on whether their objectives are research or business oriented.

Generally speaking, it seems as if the R2M strand was not entirely clear to respondents: whilst some related services correspond more to a "research" profile, others are rather "business-related" or "market-related". It can be assumed that the following types of organisations would be rather interested in a business perspective: SMEs, start-ups, large enterprises, incubators, tech transfer offices, clusters, cluster networks, business associations, chambers of commerce, science parks, public-private partnerships, business angels, etc., whilst the remaining types of organisations would be more interested by "research-related" services out of the R2M strand. This aspect should be considered when fine-tuning each service and defining the related target group.

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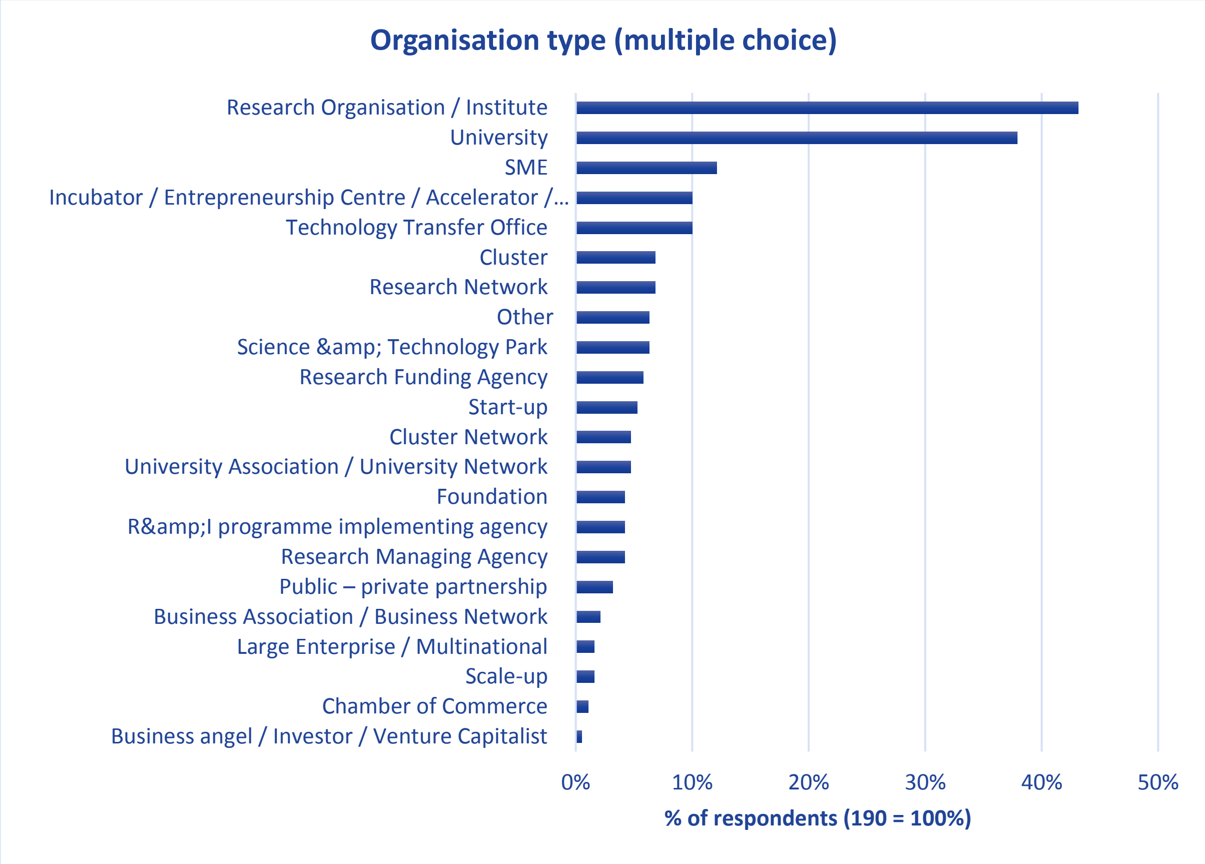

Figure 30: R2M Organisation type

In the R2M strand 15% (28) responses came from Germany, followed by Austria with 14% (16) and Spain with 6% (11) responses, quite similarly to the general statistics of 318 respondents.

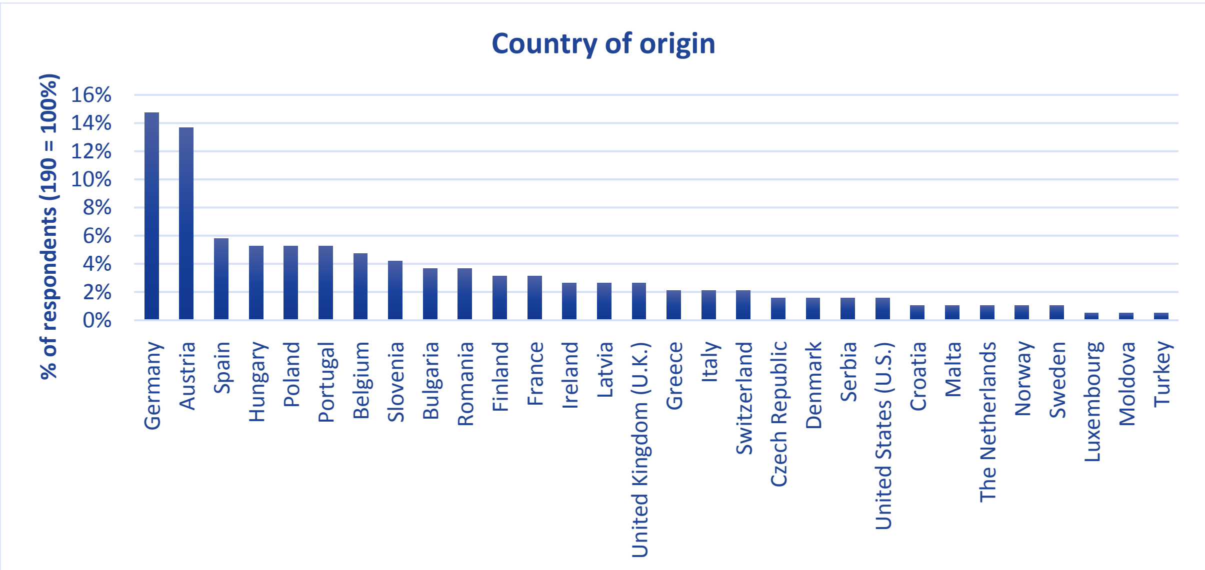

Figure 31: R2M Country of origin

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Regarding thematic areas, the distribution is quite similar to the general statistics once again, however the % of organisations involved in the field of ICT is somewhat higher, 57% (108) as opposed to 50%. Public administration, security and defence is also ranking unusually high on the list.

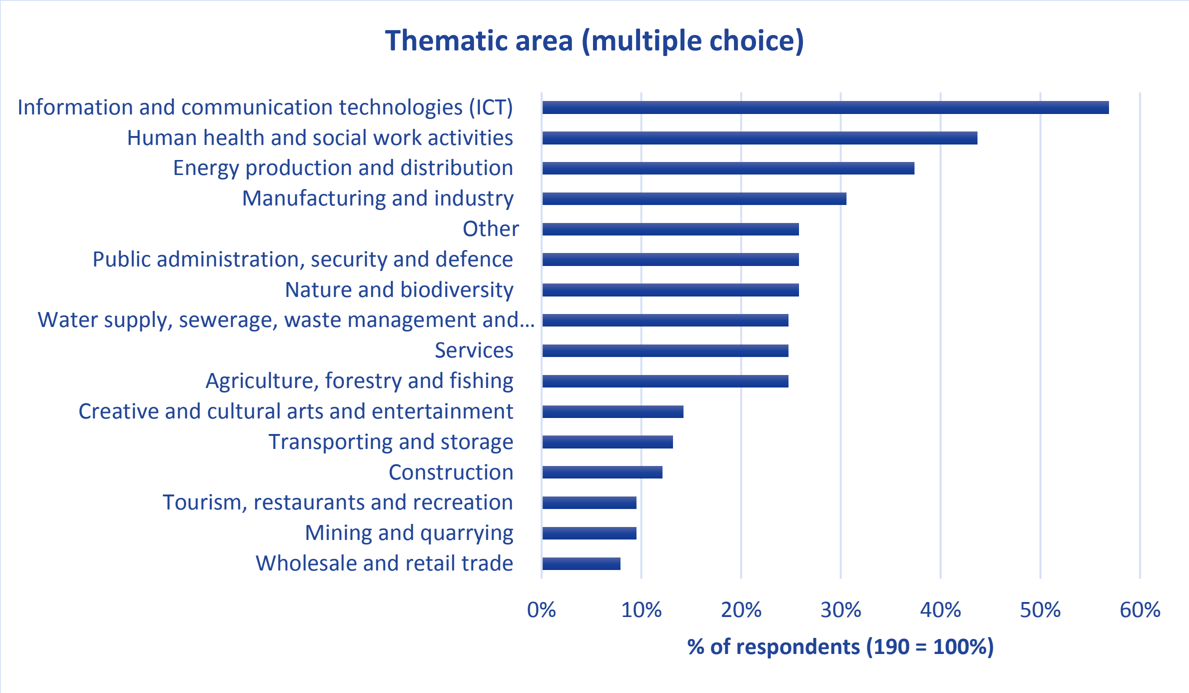

Figure 32: R2M Thematic Area

24% (45) already have activities in the US, while 45% (86) do not. In the table below, the demand for various R2M services is depicted in descending order. 'Guidelines and information on the US research landscape, list of key-contacts, etc. facilitating collaborations with US counterparts' was the most highly demanded service with 122 potential customers, while innovation tours landed second with 121 respondents. Interestingly, online services and digital tools rank also rather high in the list, while Boot camps meet relatively less success among respondents comparing with the "3 Days in 5 days tour".

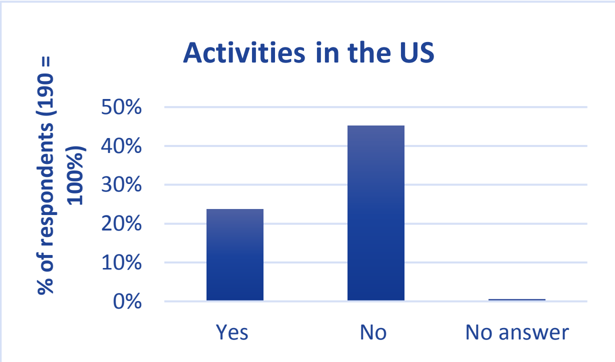

Figure 33: R2M organisations' responses to question: "Do you already have activities in the US?"

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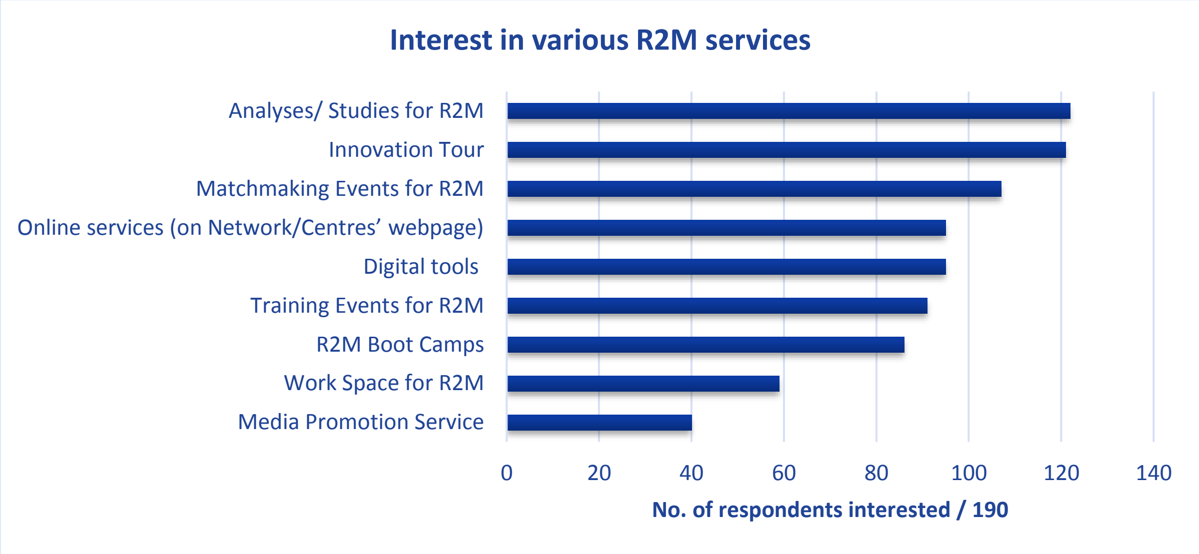

Figure 34: Interests of respondents in NearUS R2R services

R2M - analysis per services

Innovation tour/ Exploration Tour (initially called 3 States in 5 Days tour)

In total, there are 121 respondents interested in this service, named as 'Exploration Tours: visits of incubators, accelerators and US university innovation centres located in up to 3 US states' in the survey. The statistics regarding the respondents are completely in line with the R2M strand statistics, the only significant difference is within the thematic area: there are 64% organisations active in the field of ICT and 43% in Energy production and distribution (while 48% in Human health, in line with the R2M general statistics). A sector focus for the Exploration Tours should be considered.

60% are highly interested in the service, however most respondents indicate preferring attending an exploration tour "only once" (which is understandable given the investment of time and money and the exploratory nature). The majority of respondents have a preference for the programme to become available in the next 2 to 5 years, thus showing that most respondents are not ready for going international but willing and / or planning to do so and prefer to have time for further investigation and preparation.

Amongst the 24 most interested respondents (ranking 5 and wanting the service this year/ as soon as possible), there are notably 4 Romanian public-sector organisations, and a few German and Hungarian organisations. Most are research organisations/ universities from all sectors (private, public and Non-Profit), however there is also some demand from medium sized SMEs. Again, in line with the general statistics, 50% of the respondents do not have activities in the US yet, 23% already do (while the rest did not respond to this question).

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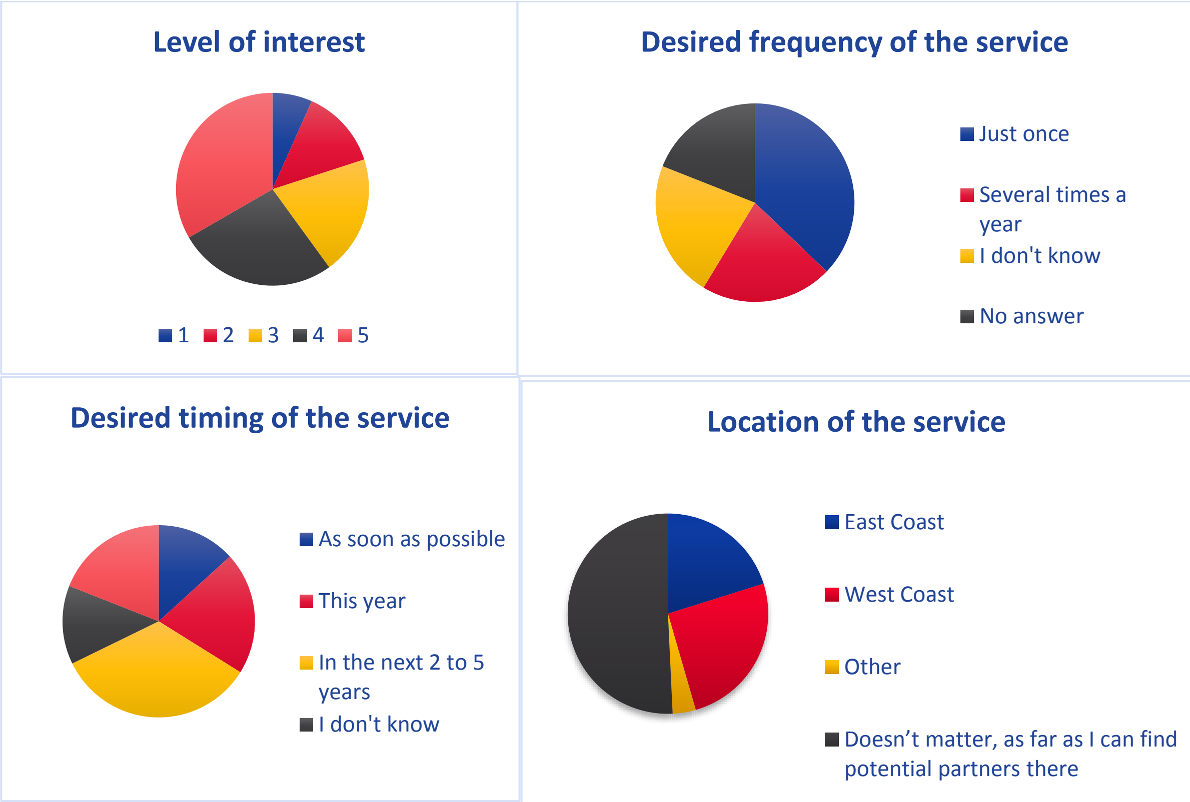

Figure 35: Innovation Tour

Conclusion: Innovation tour/ Exploration tour

121 (out of 190) respondents were interested in this service. Most respondents have a preference to attend such a tour only once, and prefer doing this a little further in the future (2-5 years from now), meaning most respondents are not yet ready to go international, but are willing to do so in the longer-term. Mostly research organisations seem to be highly interested in the service, and there was a notably high number of Eastern European countries respondents (e.g. Romanian) amongst them. In terms of sectors, ICT, Human health activities and Energy rank highest.

R2M Boot Camps

86 respondents are interested in the service called ‘Research-to-Market Boot Camps hosted at technology incubators to assist in expanding into the US market’.

22% of the respondents are from the private sector, and 24% (21/86) are either an SME or a Start-up. Compared to the R2M strand statistics, there is a high number of Incubators/ Entrepreneurship centres (16%) and Science and technology parks (13%) amongst the respondents; however, it should be noted that the question allowed for multiple choice so figures cannot be simply summed up. The distribution of countries and thematic areas was quite different as well, as displayed below (red marks signal a deviation of +/- 5% from the general R2M statstics).

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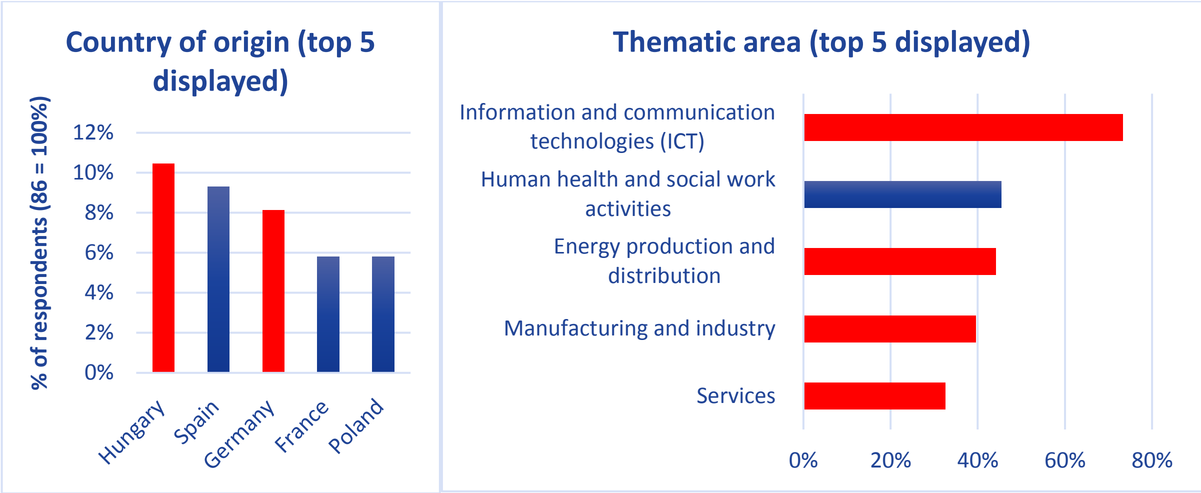

Figure 36: R2M Boot Camps answer details

Most respondents to this question are highly interested (4) but would like to use the service only once in the next 2-5 years. For most respondents, once again, the location of the service does not really matter as long as they can find potential partners. 4 out of 10 most interested respondents (level 5 of interest, requesting the service as soon as possible/ this year) are Hungarian, 3 out of which are public research organisations/ universities, and 1 private SME with an income between 0-100K€. The rest of respondents come from various countries, but are mostly either intermediary or research type of organisations.

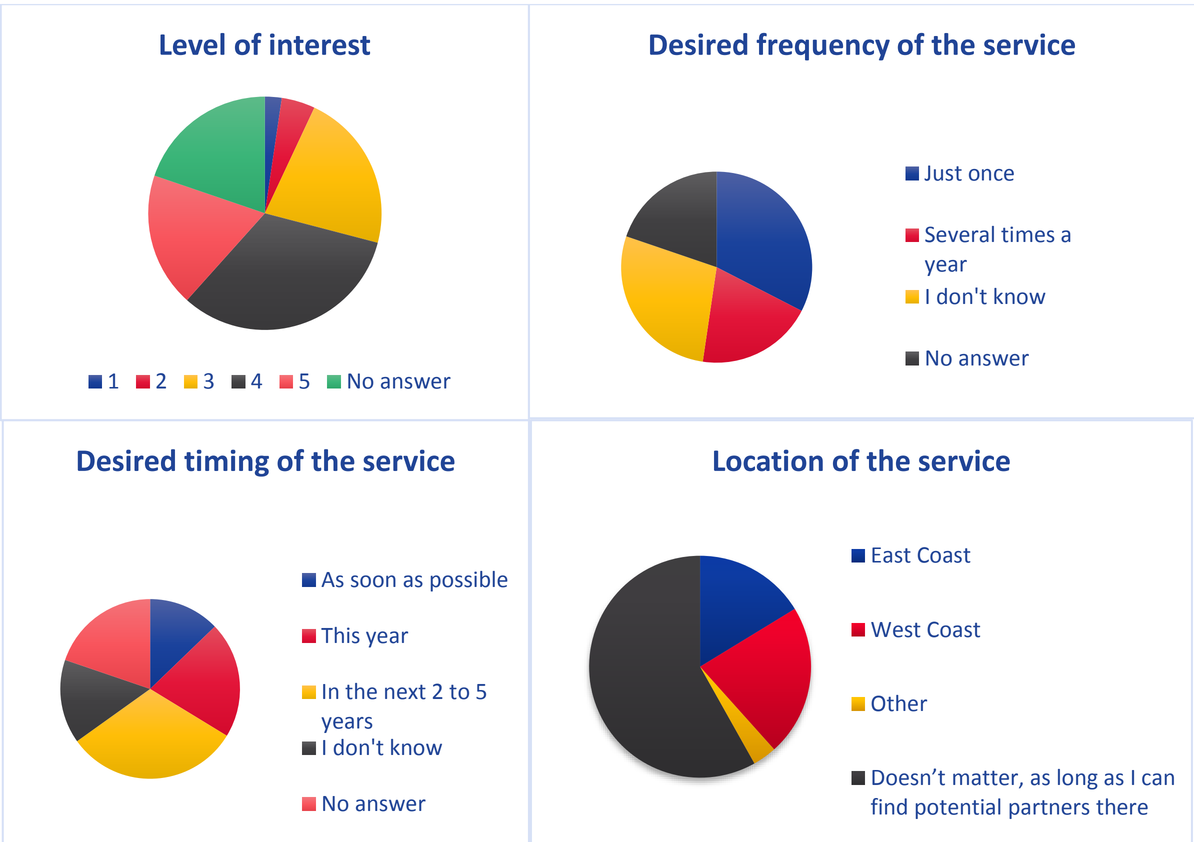

Figure 37: R2M Boot Camps answer details 2

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Conclusion: R2M Boot Camps

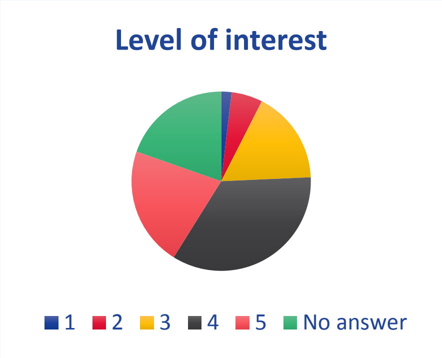
There is a moderate demand for this service: only 86 respondents expressed interest in it making this service rank 7 out of 9 in the R2M strand. It can be presumed that the respondents are not willing to go abroad right away, but are rather considering expanding internationally in the longer term. The cost of travelling to the US and duration of the camp might also be an explanation as to why the level of interest is often 3 or 4. Also, for evident reasons, respondents prefer participating in such events only once. Sectors of activity of the respondents differ a bit in comparison to other services. However, is should be noted that the respondents did not have information in the survey on the details about the organisation of the Boot camp, e.g. it is planned by NearUS to organise the Boot camps in an individualised way (2 days training, then individual programme during a week, prepared according to the needs of the participant, then 2 days joint programme and debriefing). Thus, one might expect higher demand for such a Boot camp service. It would seem useful to promote the Boot camps in a way that clearly presents the individual character of the Boot camp programme.

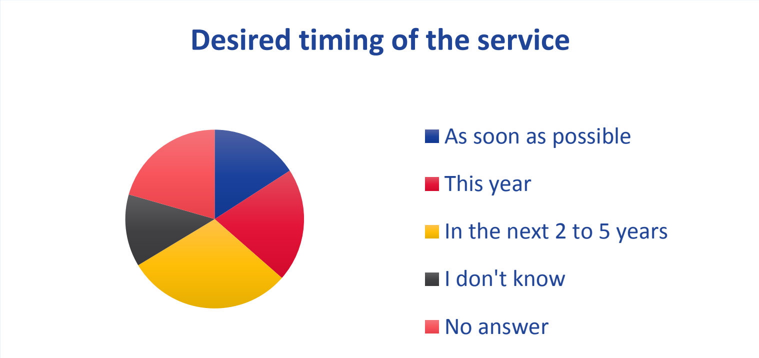
Matchmaking Events for R2M

107 respondents are interested in the service named as ‘Matchmaking and Investor Pitch Events for European researchers and entrepreneurs looking for partnering and investment opportunities in the US’ in the survey. The statistics are in line with the general R2M statistics, however there is a low percentage of stakeholders that indicated themselves as universities. Also, there is slightly higher number of organisations involved in ICT (64%) and Water supply (31%) related fields.

Identically to the other R2M services, stakeholders would like to attend such events in the next 2 to 5 years, rather than straightaway. Most respondents would like to either attend matchmaking events twice a year or at special occasions.

However, the most interested respondents that marked 5 as their level of interest and would like to attend matchmaking events in the near future, are from diverse organisation sector & types. The majority of them come from Hungary and are research type of organisations mostly from the public sector, however there are also some intermediaries, such as Research Network or Research Funding agencies, along with a few SMEs and Start-ups, and one Cluster.





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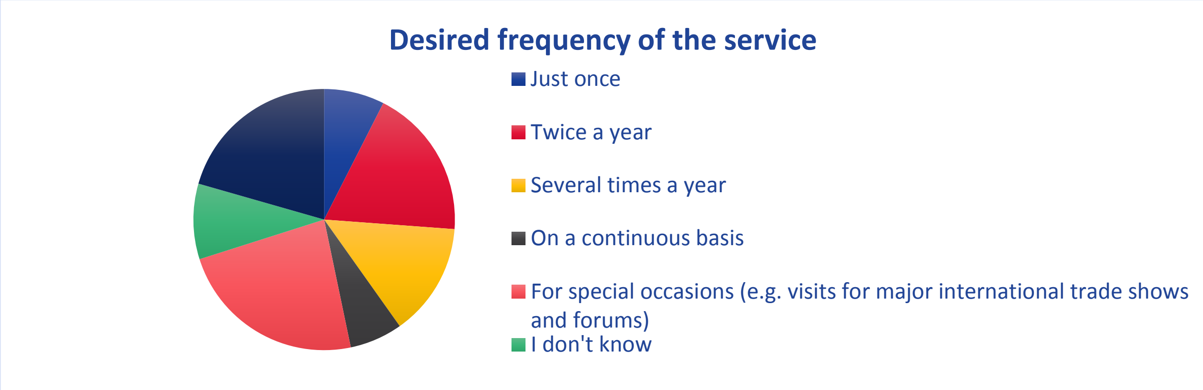

Figure 38: Matchmaking Events for R2M answer details

Conclusion: Matchmaking Events for R2M

107 (out of 190) respondents are interested in this service, making it the 3rd most popular service in the R2M strand. Most respondents have a preference to attend such events either twice a year or on special occasions, e.g. in connection to major international events, and mostly somewhat further in the future (2-5 years from now). The majority of highly interested respondents are research organisations many of which are involved in ICT, and amongst which there is notably a high number of Hungarian respondents.

Analyses/ Studies for R2M

This service, named as 'Guidelines and information on the US research landscape, list of key-contacts, etc. facilitating collaborations with US counterparts' was the most popular service in the R2M strand, with 122 people being interested in it. The statistics regarding the respondents' profile were completely in line with the R2M strand statistics.

The majority of respondents were highly interested in the service (4 or 5) and would like to get access to it as soon as possible or this year. 74% of the 35 most interested respondents (level 5 of interested and wanting the service this year/ as soon as possible) are Public organisations, the rest Non-Profit with the exception of 3 private-sector organisations. With the exception of 8 organisations that are likely to be intermediaries (Research networks, SME promoting agencies, University associations), and 1 Science & Technology park, all respondents were either Research organisations or Universities. The 35 respondents' come from a variety of different countries, however the most frequent ones were the following: Austria (6), Germany (5), Spain (4), Hungary (4), Romania (3) and Portugal (3).

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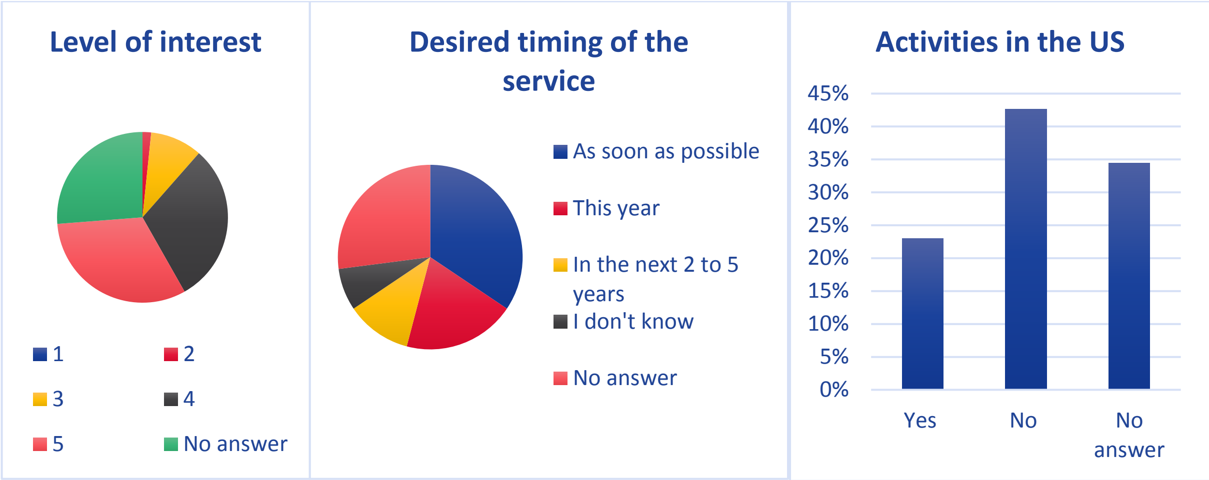

Figure 39: Analysis/ Studies for R2M answer details

Conclusion: Analyses/ Studies for R2M

There is a very high demand (122/190) for this service within the R2M stream: while in R2R and B2B the equivalent of this service ranked as 4th and 5th respectively, in the R2M strand it ranked as 1st.

As previously mentioned, generally there is a high need for support amongst R2M stakeholders, however there seems to be a reluctance in expanding internationally immediately, or at least attending events in the US. Using guidelines and digital tools may seem as an easier or more affordable solution to some of the R2M stakeholders. As seen, most respondents for the Analyses/Studies service are public research organisations and universities, which means that these organisations might often not have the means to travel, so they might prefer to first learn about the opportunities they have, and only attend matchmaking and other events on special occasions.

4.3.2 Interview elements

Besides the possibilities conferred by NearUS services to interact with potential partners from the US, the interviewees also expressed their desire to receive support in the form of online services, market analyses, business and scenario planning, mapping of RTD challenges, technology transfer, search for investors, providing access to funding opportunities, etc.

Given the wide range of organisation profiles in the R2M domain, the supporting schemes these organisations seek are different and go beyond the ones identified for this strand. According to the interviewees, services dealing with entrepreneurship, business development, business' competitiveness, business and scenario planning, technology transfer, project management, mediation or intellectual property are of high demand when seeking support for going international.

An interviewee underlined the need for better identifying (and thus getting) contacts from US companies for co-developing new products as well as potential associated funding, as an essential service for favouring its developments towards US.

Despite the interviewees being potentially interested in carrying out activities in the US, they are still reluctant to pay for the services. None of the interviewees provided an approximate

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fee for which they would use the services, and two were basically not willing to pay for such services.

4.3.3 Synthesis of the segment

60% respondents of the survey (190/318) identified R2M as their strand of interest.

This strand has however a major “semantic drawback” that impacts on its framing and associated developments. Indeed, Research2Market sits between Research and Business, thus encompassing stakeholders who mainly identify themselves as one of these two latter.

Indeed, from the analysis of the survey results, it becomes clear that start-up and spin-off type of respondents considered “their” strand to be the Business2Business one, regardless of their states. Nonetheless, most Research2Market services were initially planned for these stakeholders.

Moreover, most of survey and interview respondents seem to not be ready in expanding internationally immediately, or at least do not seem ready to confer time and money for such a move. This can be explained by the fact that these stakeholders are yet too far away from markets to consider taking NearUS opportunities. As a result, the target group for this strand or for some services of this strand might need to be reconsidered.

The table below presents the different services, ranked according to the interest they generate among R2R stakeholders.

Table 5: R2M services ranking and associated remarks

Rank	Service	Stakeholder types interested	Remark
1	Analyses / Studies	All R2M stakeholders	“Loss leader’ product for R2M other services / activities; Same sectorial distribution as R2R; Could tackle research & innovation environment, including IPR matters, funding opportunities and business acceleration elements
2	Exploration tours	Research organisations	Respondents preference for ”the next 2 to 5 years” indicating market immaturity Themes of interest: “ICT” and “Energy production and distribution”
3	Matchmaking events	Research organisations	To be anchored in connection to major international events, and also in ”the next 2 to 5 years”; *May be reconsidered and / or reframed*
4	Bootcamps	Research organisations / Incubators / Science and technology parks	“only 45%” of R2M stakeholders are interested in R2M bootcamps; *May be reconsidered and / or reframed*

In line with previous conclusions, the fact that boot camps are not in top 3 do not forcibly indicates a disinterest from the target stakeholders. This is notably made in evidence by the similarity of stakeholders having selected these boot camps in the B2B strand (see below).

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Therefore, further analysis, that can be led through the pilot services, on the impact of NearUS terminology and related parameters is needed.

Beyond semantic: R2M exploration tours, boot camps and matchmaking events

Overall, it can be concluded that most of respondents fitting the R2M criteria, while being interested in NearUS services, are logically in initial stages of accessing markets, thus not entirely ready to go international. Relying on regional stakeholders for informing and advising end-users seems to be an option to prefer, intermediaries such as incubators, accelerators and technology transfer services being the most relevant and interested "hub" for disseminating NearUS relevant info and services.

Focusing on Hungary, Romania and other 'Eastern European' countries for first customers could be the best strategy for testing pilot services.

On the other hand, R2M boot camps do not seem to meet the end-users' actual needs (at least the way they were presented in the survey). Adapting this service format to the capacities of these stakeholders, redefining its targets or ensuring that the selection process is addressed to the most developed stakeholders are three options to consider for bringing it to success.

4.4 Needs in Business to Business - Services for businesses willing to expand to the US

4.4.1 Services identified and survey stats

Business to Business - General Statistics

To the question "Among the following key services of the European Research and Innovation Centre, which one would you be interested in?", 109 respondents clicked on "B2B": Key services supporting business relations between at least two companies.

The sector of organisations that are interested in B2B services largely differ from the US support needs general statistics. Most of them are private (51), 34% (37) are public and 31% (34) also Non-Profit.

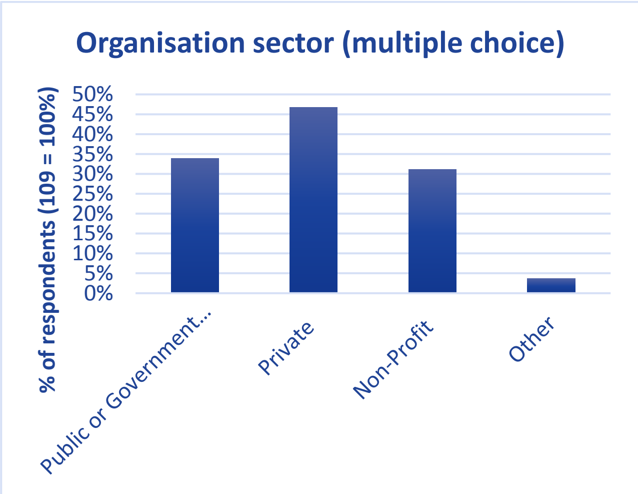

Figure 40: B2B Organisation sector

In total 74 private organisations were looking for support in the US, and 69% (51/74) of those were looking for B2B services. On the contrary, only 19% (37/195) out of all the public organisations needing support in the US, were interested in B2B, which is not surprising. 28% (30) are SMEs, 25% (27) Research organisations and 19% (21) Incubators/Accelerators, whereas universities have fallen here to the 11th place. In total 38 SMEs, 31 Incubators, 20 Clusters and 17 Start-ups were interested in services in the US.

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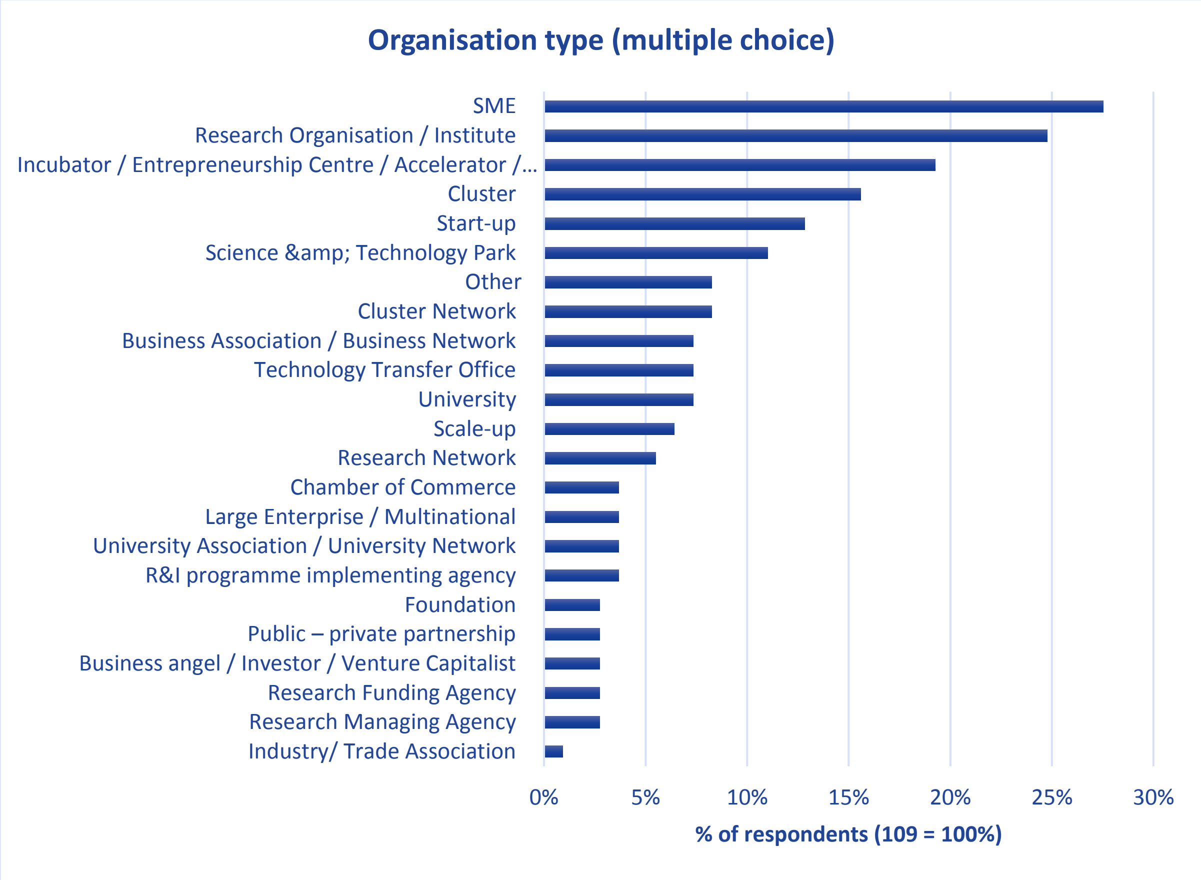

Figure 41: B2B Organisation types

The distribution of country of origin of respondents within the B2B strand somewhat differed from that of the general statistics and the other strands. As opposed to the majority countries of origin of the 318 overall respondents seeking for support in the US, in the B2B strand most responses are from Austria (15%), not Germany (10%). There were also relatively more responses in % terms from Belgium (7%), Hungary (7%) and Bulgaria (6%).

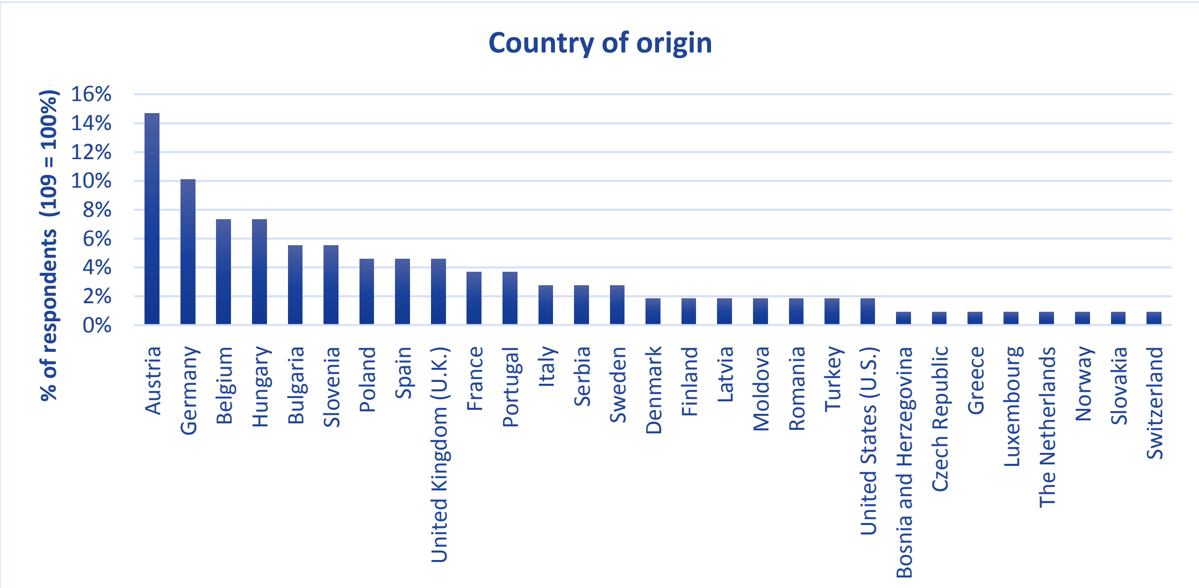

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Figure 42: B2B Country of origin

Regarding thematic areas, ICT is by far the leading field of organisations with 59%, that is 9% higher than in the general statistics. The proportion of organisations involved in the energy and manufacturing sector is also relatively high. On the contrary, there are slightly less organisations that are involved in health and social work activities (32%, knowing that the general statistics shows 40% of health-related respondents).

Regarding thematic areas, ICT is by far the leading field of organisations with 59%, that is 9% higher than in the general statistics. The proportion of organisations involved in the energy and manufacturing sector is also relatively high. On the contrary, there are relatively less organisations involved in health and social work activities (32% as opposed to 40%).

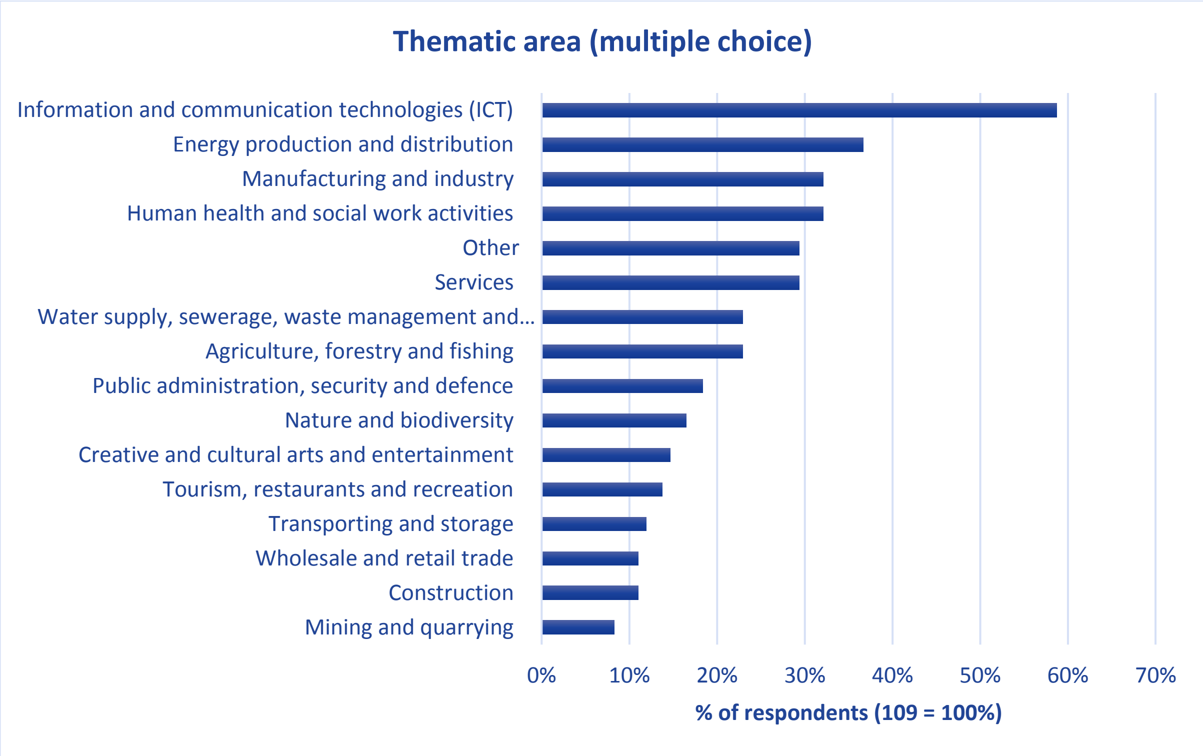

Figure 43: B2B Thematic area

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As regards the experience of respondents with the US, 22% answered that they already have activities in the US, 49% do not yet have any, while 29% did not respond to this question.

In the table below, the interest in various B2B services is depicted in descending order. Matchmaking and Venture Capital Pitch was the most popular service with 74 interested respondents, while Media promotion service was the least popular one with 30 respondents.

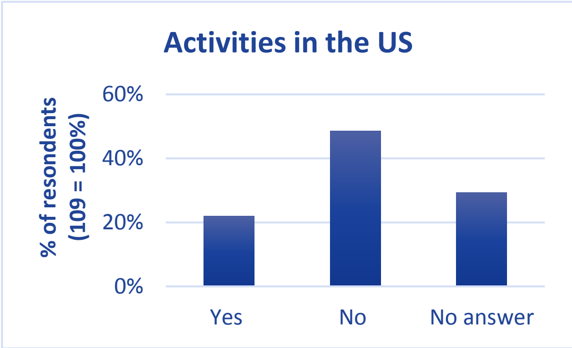

Figure 44: Organisations responses to the question "Do you already have activities in the US?"

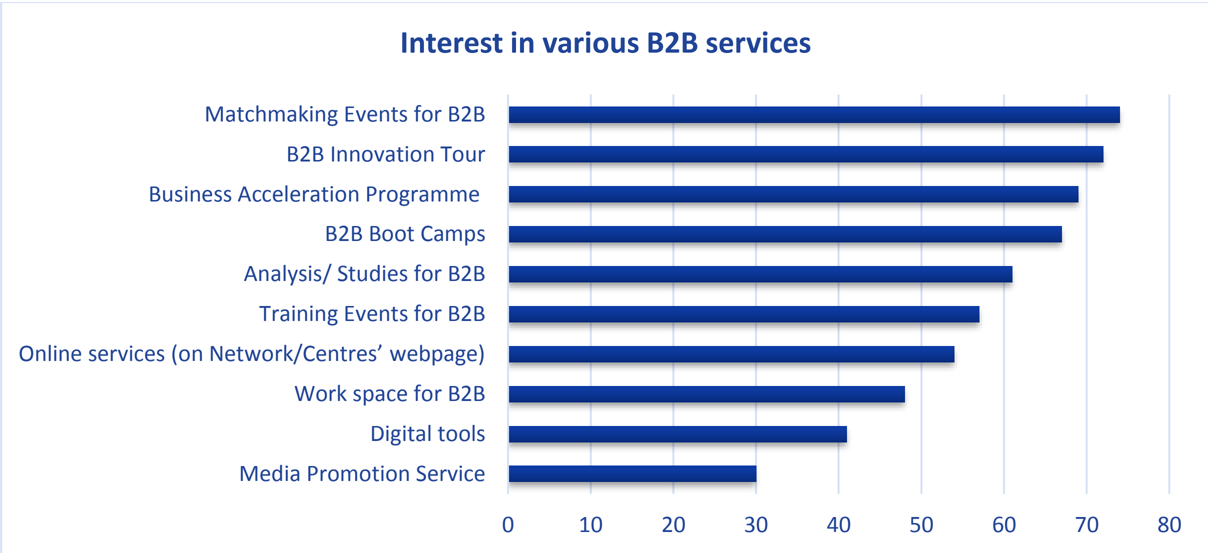

Figure 45: Interests of respondents in NearUS B2B services

When asked on which services the respondents would spend the most money, the two most regarded services, with 35 selectors each, were Matchmaking events and Exploration tours. The Business Acceleration Programme service was selected 25 times, while B2B Boot camps 24 times and Training events 18 times.

Analysis of B2B services

B2B Innovation Tour/ Exploration Tour

Overall, 72 respondents were interested in this service, named 'Exploration Tours: visits of incubators, accelerators, open innovation ecosystems, university innovation centres, large US firms & governmental initiatives located across up to 3 US states' in the survey, most of which are surprisingly Public organisations. There is a relatively high number of Public organisations and sparse number of Private organisations compared to the B2B general trend. There is also a relatively high percentage of organisations involved in Human health and social work activities and Services.

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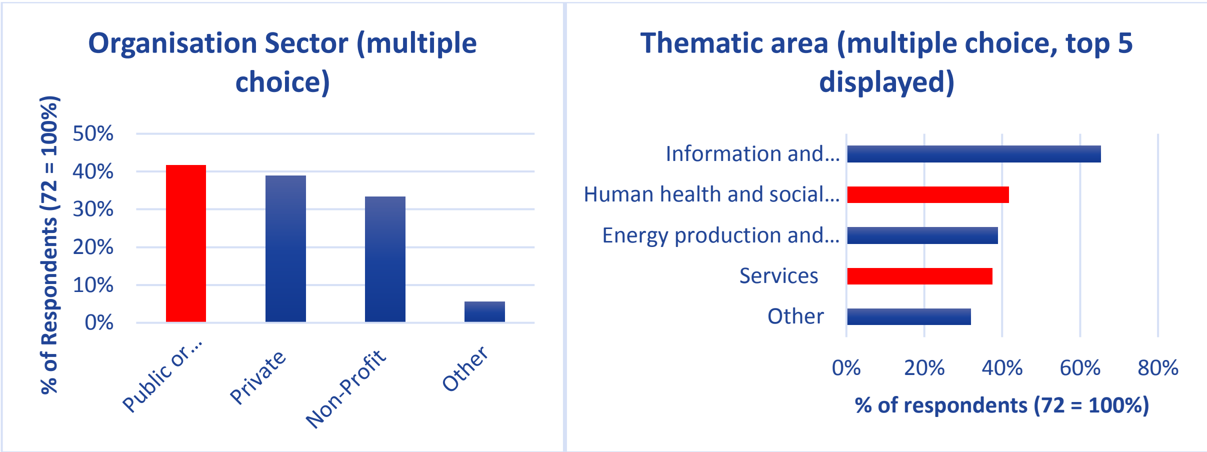

Figure 46: Innovation Tour answer details 1

71% of the respondents are highly interested in the service, however the largest proportion of all respondents would like to use the service once a year only. The rates are split between respondents who would like to use the service this year and those who are thinking of using it in 2-5 years' time. For most respondents, the location of the service does not matter as long as they can find potential partners. The most interested respondents (4-5 level of interest), and the ones that are requesting it either as soon as possible or this year, mainly come from Bulgaria (5) and Hungary (4).

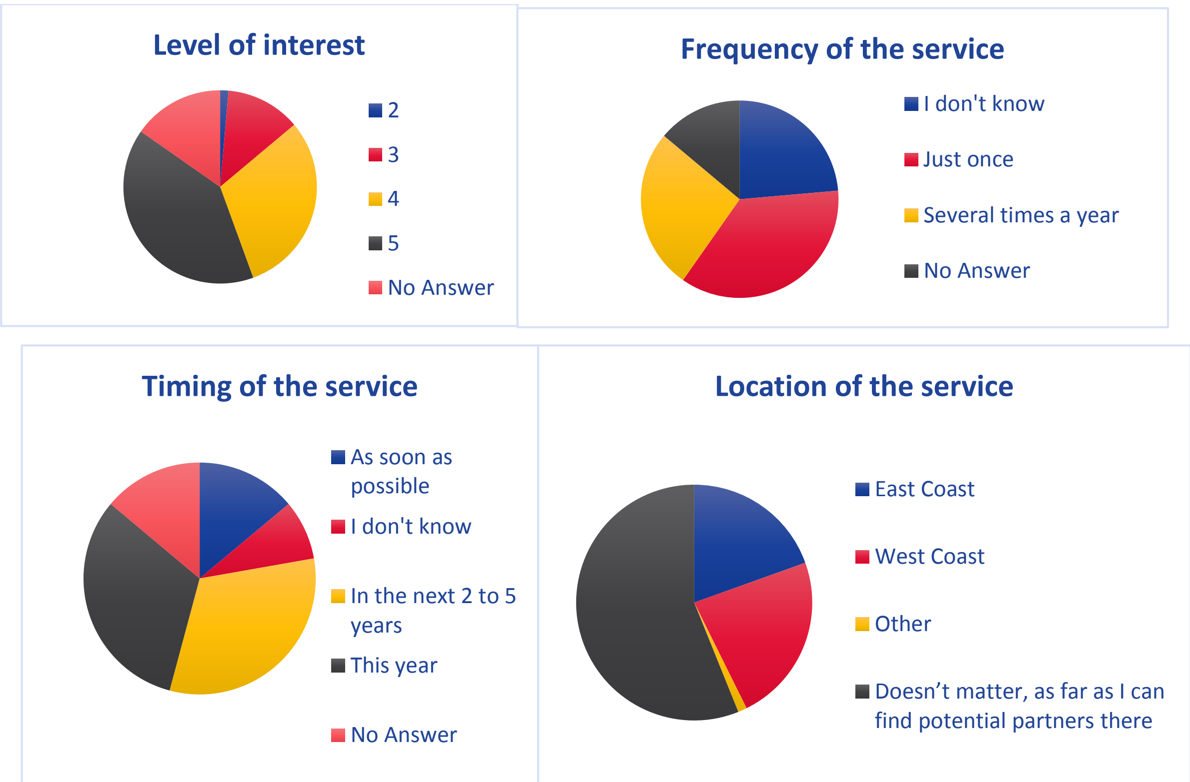

Figure 47: Innovation Tour answer details 2

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Conclusion: B2B Innovation Tour/ Exploration Tour

This is the 2nd most popular B2B service, with 72 (out of 109) respondents demanding it. These 72 respondents are also very highly (4 or 5) interested in it. Most are willing to attend such events only one time (which is understandable given the financial constraints), however as much as 26% would be attending several times a year. Amongst the most interested respondents, there are notably many Eastern Europeans. There is a strong ICT focus and respondents surprisingly often are public organisations.

B2B Boot Camps

67 respondents expressed interest in this service, named as ‘Business-to-Business Boot Camps for European businesses that are in the early growth stage and ready to participate in US accelerators’ in the survey. There is a relatively high % (18% as opposed to 11% in the general B2B strand statistics) of Science and Technology Parks interested in this service. There is also a higher % of organisations involved in ICT (66%) and Human health (39%) related fields and relatively little Austrian respondents interested (9% as opposed to 15% in the general B2B strand statistics).

64% of respondents signalled high interest (4 or 5) in the service. The responses are quite varied regarding the frequency and timing of the service. The response rate is also nearly equal between those who would like to attend boot camps this year and those who would like to attend in the next 2 to 5 years, and the same holds regarding whether the service should take place on the East or West coast. The desired duration of the boot camp is clearer: most respondents (45%) prefer a 1-week long boot camp, some (16%) would be content with 2 weeks, and it is important to note that no respondents chose three weeks as an option. It is also worth noting that 51% of the potential customers do not have any activity in the US yet, thus it means they would be willing to fly to the US for a 1-or 2-week camp.

To go deeper in the analysis, there were 16 primary customers who marked 5 as their level of interest and demanded the service either as soon as possible or this year. These organisations are diverse regarding their sector and thematic, what stands out however is that there are 4 science and technology parks amongst them (2 from Poland, 1 from Italy and 1 from Sweden). There are 3 Hungarian respondents, 2 Danish and 2 Polish, most of them either from a research type of organisation or Start-up/SME.

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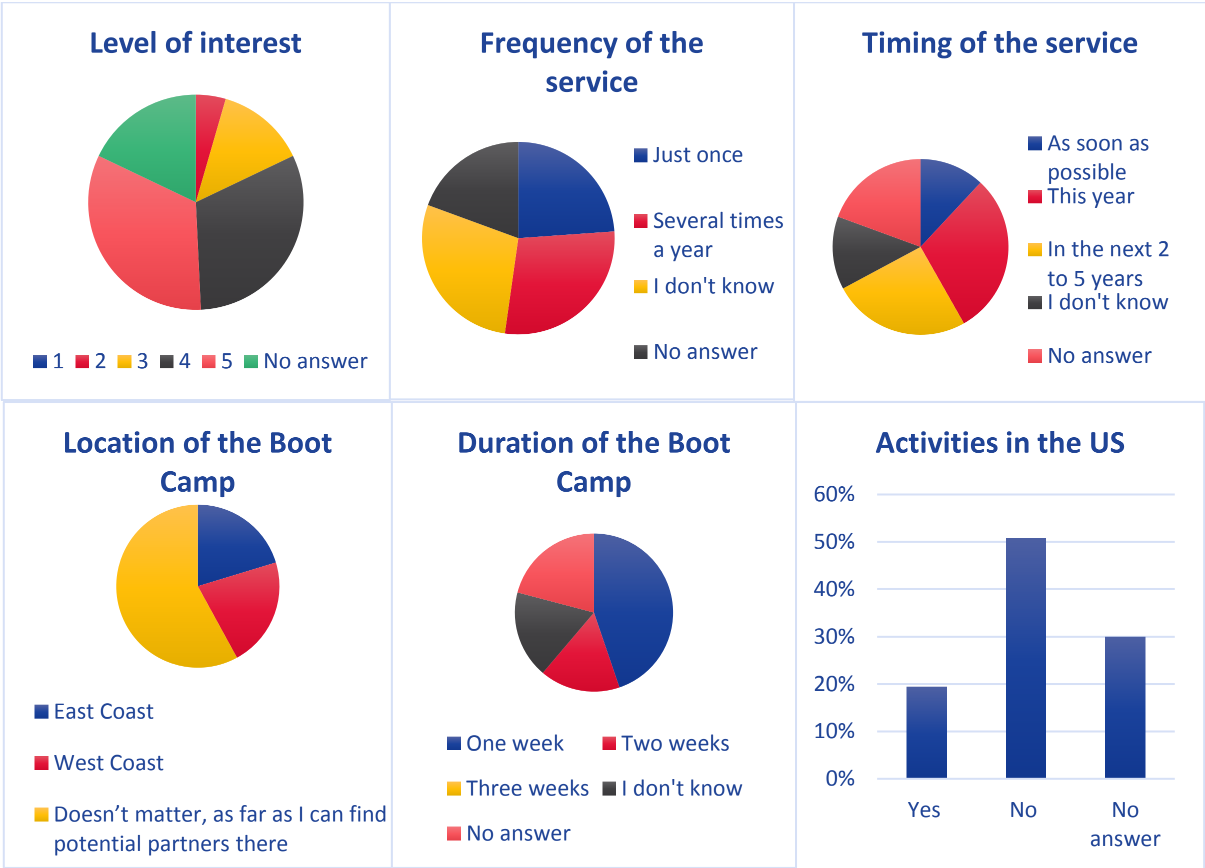

Figure 48: B2B Boot Camps

Conclusion: B2B Boot Camps

There is a high demand for this service amongst varied types stakeholders. Many would also be willing to attend these types of events as soon as possible or this year, and many of them even several times a year. It is clear that the duration of the boot camps should be 1 week.

Matchmaking Events for B2B

This service, named as 'Matchmaking and Venture Capital Pitch Events for European early-growth businesses looking for partnering and investment opportunities in the US', is the most popular B2B service, with overall 74 respondents interested in it. The organisation type, sector and country is in line with B2B general statistics. Regarding the thematic area of respondents, there are relatively more organisations involved in Human health and social work activities (39%), ICT still remaining the sector of a majority of respondents interested in this service, in line with the general statistics.

Two third of the respondents are very interested in the service. Regarding the frequency, the responses are quite diverse: the biggest proportion of respondents does not know how frequently they would like to attend such events, while many showed a preference towards twice a year. Interestingly, 14% are interested to attend matchmaking events primarily if there is a special occasion, such as a major international trade show or forum. It also seems like the respondents are not in urgent need of this service as most of them would like to attend such events either this year or in the next 2 to 5 years.

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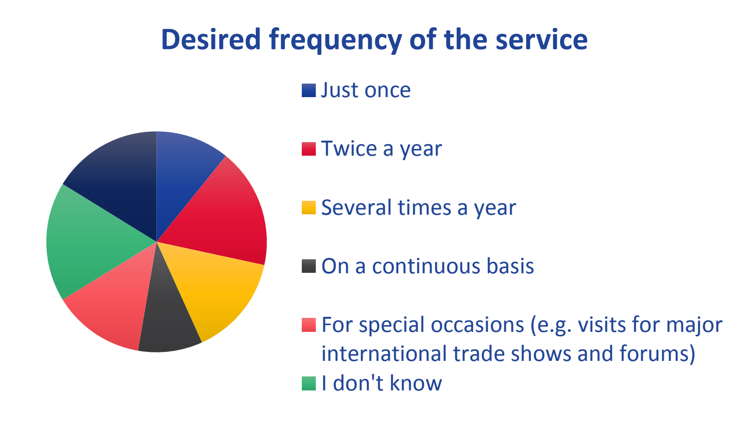
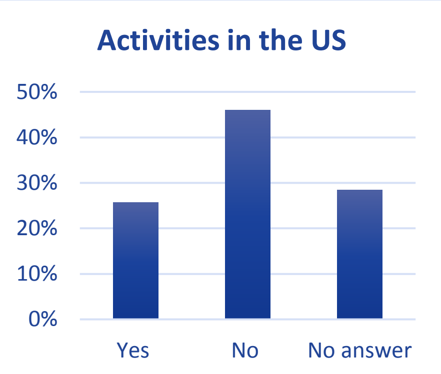
Out of those who marked 5 as level of interest, most respondents were Hungarian (5) and German (4). Also, nearly half (and most) of the respondents who ticked either 4 or 5 as level of interest were private organisations. Amongst the 12 organisations that were very highly interested (5), wanted the service to be available very soon and often or on a continuous basis, there was a Belgian SME with an income in between 100K€-250K€, a small Belgium pre-revenue start-up, 4 various Hungarian organisations (start-ups as well as research organisations), and, to be noted, a private multinational and a private SME from the US.





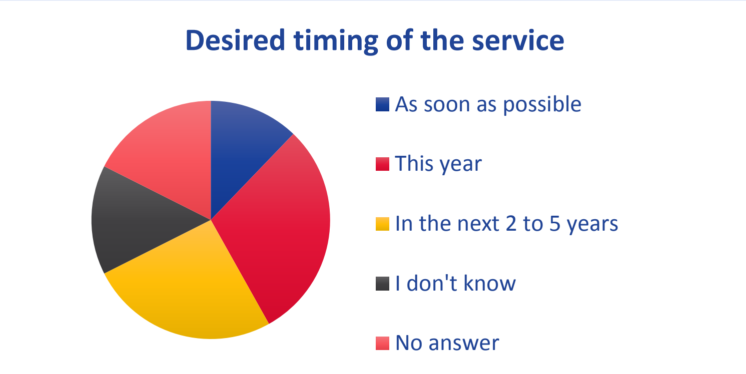


Figure 49: Matchmaking Events for B2B

Conclusion: Matchmaking Events for B2B

'Matchmaking events' is the most popular service in the B2B strand, with more than 2/3s of the 109 B2B stakeholders being interested in it. The respondents are visibly very interested in it and marked their level of interest as 4 or 5, and many would also like to attend such events in the near future. There were notably many businesses, SMEs, start-ups interested, and a lot of respondents from Germany and Hungary.

Business Acceleration Programme

Overall 69 respondents were interested in the Business Acceleration Programme, making it the third most demanded B2B service. Compared to the general B2B statistics, the percentage of Non-Profit organisations (39%) is a little higher. There are slightly less Austrian respondents as well (9%).

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Within the business acceleration programme there are 6 subservices which were rated by the respondents on the scale from 1 to 5. Based on the rating, the services can be sorted into 3 categories:

Above 60% (4+5 ratings):

- Support for introduction to end-clients and partners for Proofs of Concept and Pilots (64%)
- Support for business development and sales/marketing plan (62%)
- Support for introduction to the local community (strategic partners, events and law firms, business angel networks, venture capital firms) (62%)

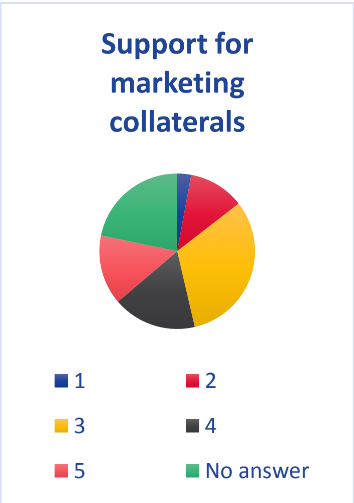
Above 50% (4+5 ratings):

- Support for Product Road Map Documents (Market requirements, Product requirements) (55%)
- Support for advisory sessions with industry experts (52%)

Below 50 (4+5 ratings):

- Support for marketing collaterals (including website) (31%)

The numbers above illustrate the demand quite well: there is a relatively high demand for most services, however the demand for support for marketing collaterals is very low. Most respondents seem to have a longer-term vision and would like the service to become available in the next 2 to 5 years. Support for sales and local partners do logically correspond to the needs of EU firms willing to develop in the US, as most of the times they might not know about the local business environment and are not involved in any networks, do not have many connections. On the contrary, there is clearly a lack of demand for marketing collaterals, which may be due to firms already having this kind of support or not needing it at all.



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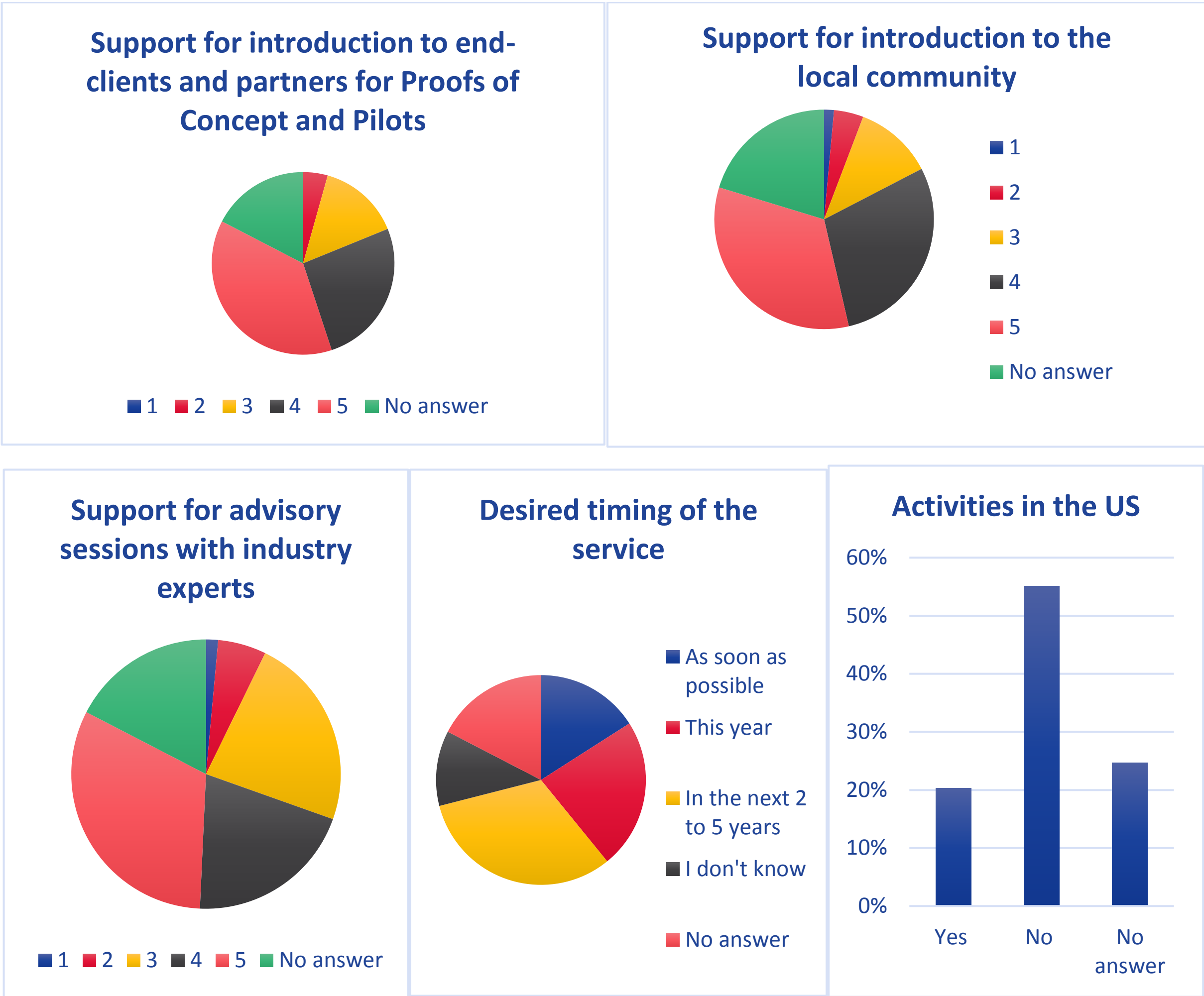

Figure 50: Business Acceleration Programme answer details

Conclusion: NearUS business acceleration programme

Overall, the business acceleration programme ranked as the third most demanded within the B2B services. Respondents, many of which would participate in such a programme starting this year, seem to be seeking support for sales and meeting local partners/ local community, which makes sense since they are new to and unfamiliar with the market. On the other hand, there is very little demand for support in marketing collaterals.

Analysis/ Studies for B2B

The service named as 'Guidelines and information on the US innovation & business landscape, list of key-contacts, etc. facilitating collaborations with US counterparts' had 61 respondents and is the 5th most demanded B2B service. The number of Incubators/Accelerators (26%) was relatively higher than in the B2B strand statistics, otherwise there were no deviations regarding the statistics on the respondents.

The 17 most highly demanding respondents are from various sectors and organisations types. Some of them are private SMEs and start-ups from countries like Hungary and Austria, others are universities and research organisations from Spain, Moldova, Belgium, while yet again others could be intermediaries, such as Business Associations, Small and Medium Enterprises Promotion Agencies, and Clusters.

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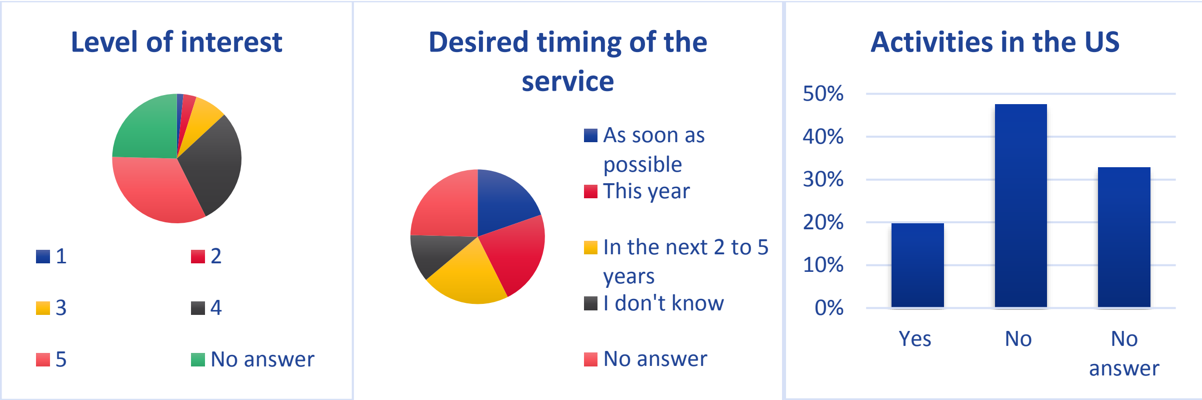

Figure 51: Analysis/ Studies for B2B

Conclusion: Analysis/ Studies for B2B

There is a moderately high (61/109) interest in this service. 2/3s of the respondents marked 4 or 5 as their level of interest in the service and many are willing to use the service either as soon as possible or this year.

4.4.2 Interview elements

Interviewees currently not involved in the US identified any services providing support in the better understanding of US market conditions as beneficial. Also, access to a network of potential partners, promotion opportunities, support in entering US professional awards are considered as assets for going international.

A relevant element highlighted during the interviews concerns the potential need of the centre to cooperate with relevant business and industrial associations from several Members States at the European level. This cooperation could establish and further improve the relations between the business organisations in Europe with its American counterparts, leading to the promotion of joint initiatives such as events, missions and matchmaking sessions between regions. This is also connected with the media services that the centre should have in order to properly disseminate its activity and gain trust among its potential clients and building the centre’s reputation. The potential clients should be able to perceive the added-value of the centre and the effectiveness of the activities it offers.

Furthermore, some interviewees consider that the US market is highly interesting from the investors side. However, getting investors to support European businesses is not easy, according to the opinions of the interviewees. It was pointed that there are more possibilities of cooperation through a joint funding model than a direct investment from the US side.

Another outcome is a type of service identified by an interviewee which is not addressed by the project, namely the Business to Research (B2R) services:

This type of service can support businesses in their efforts to cooperate with researchers, research institutes, universities, labs etc. in the US These companies mainly offer or produce certain devices that can be utilized in various research fields. B2R services can help such businesses to deliver their products to the US markets and make the devices available for the research community in the US. However, it should be further investigated whether such services meet a crucial degree of demand, i.e. how many businesses would be potentially interested in to utilize such services. It is highly possible that companies that would be possibly interested in B2R services operate in niche markets and do not constitute a group with decisive

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size. But if the amount of interested businesses reach a certain point, the broadening of the NearUS services and the launch of the B2R services should be taken into consideration.

4.4.3 Synthesis of the segment

34% respondents of the survey (109/318) identified B2B as their strand of interest among which 51 private organisations are looking for support in the US.

Austria seems to be the most interesting country to focus on, Belgium, Hungary, Bulgaria, Poland and UK being secondary options since their respondents were relatively more interested in support in B2B services, while respondents from Germany, Spain and Portugal seem to be less in need of support.

Table 6: B2B services ranking and associated remarks

Rank	Service	Stakeholder types interested	Remark
1	Matchmaking events	SME / Research organisations	“Partnering and investment opportunities in the US” is the core appeal of the service; Stakeholders are interested in it soon and often or even “on a continuous basis”, which raise the question of its format
2	Exploration tours	Public Research organisations	Discrepancy between Exploration tours objectives & respondents’ profiles *Format may be reconsidered and / or reframed for accessing the actual targets aimed at*
3	Business acceleration programme	SME / start-ups	Support for introduction to end-clients, local community and partners are the most wanted; Little demand for support in marketing collaterals
4	Bootcamps	SME, Start-ups, Science and Technology Parks	Format of choice: 1-week long As for all services located in the US the East / West differentiation does not seem to matter as long as customers can find potential partners
5	Analyses / Studies	All B2B stakeholders	Moderate interest *Format may be reconsidered and / or refocused on topics that could be of interest for businesses (business and industrial associations, partnership & alliances, IPR, direct investment, etc.)*

To be noted, for successful international market and/or R&I cooperation with the US, specific partnerships and alliances are needed. The interviewees identified the partnership of SMEs and universities as crucial for successful operation in the US, but besides that, joint venture enterprises are also key for success.

4.5 Needs for Transversal services

Step-by-step navigation on the Network’s webpage

In total, 171 respondents out of 318 are interested in this service (from all 3 strands, counting only once the respondents that were interested in the service in multiple strands), called ‘Online access to exclusive info for researching scientific sponsors and identifying potential partners’.

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The statistics regarding sector, organisation type and thematic area are largely the same as the general statistics for the 318 respondents interested in the US.

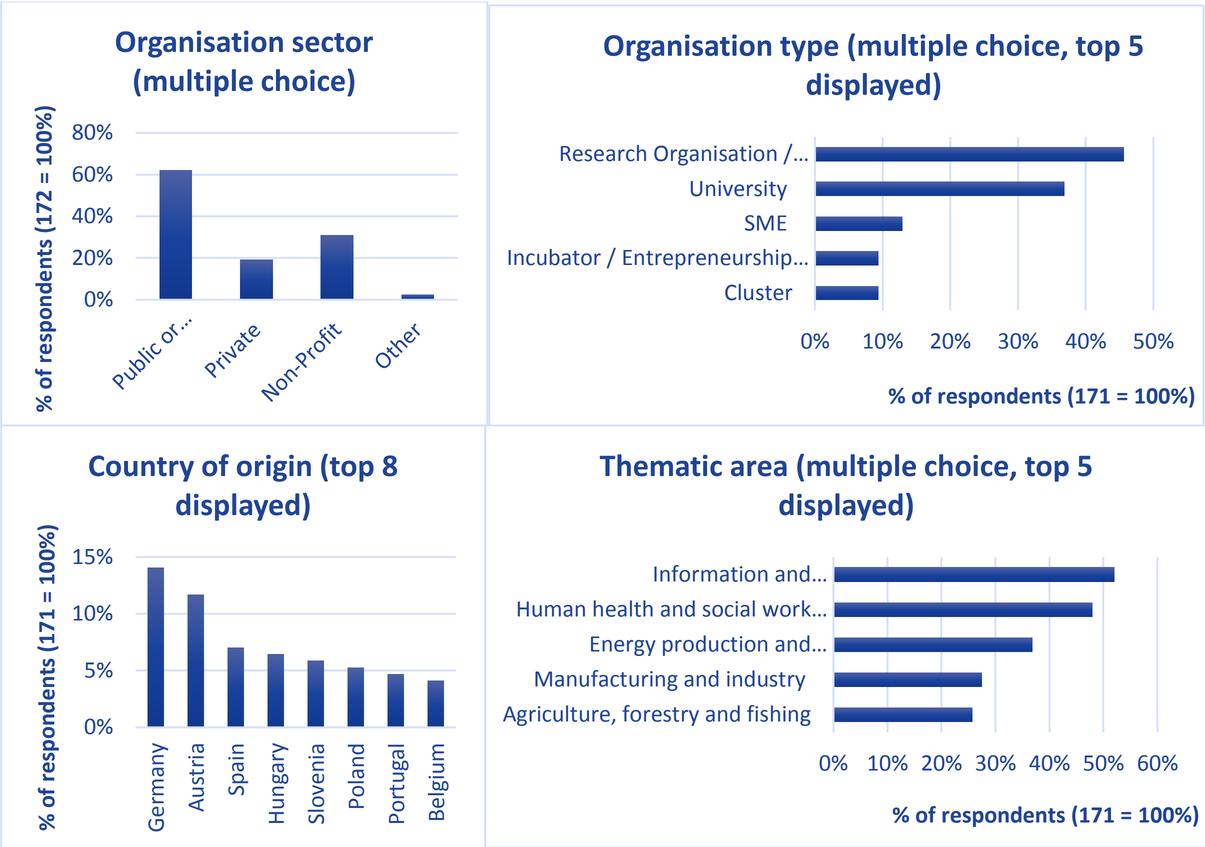

Figure 52: Step-by-step navigation answer details

It can be concluded that there is a very high demand for this service: 53% (171/318) out of all respondents who are seeking support for their activities in the US, are also interested in this service.

In the “Step-by-step navigation answer details 2 (3 strands combined)” figure below, the aggregated interest from the 3 strands is displayed by counting the answer of each respondent only once or taking an average where necessary. Most of them (64% of respondents chose 4 or 5 as their level of interest in the service) are highly interested and would like to use it on a continues basis the sooner the better.

In total, there are 60 organisations that rated the service at 5, would like it as soon as possible/ this year and on a continuous basis. Among these 60 responses, 10 came from Germany. Out of the 10 German ones 8 were public research organisations/ universities, 1 Research network and 1 private start-up in the field of energy production and an income between 500K€-1M€. There were 7 institutions from Hungary, including a Non-Profit cluster in the energy production field and other research type organisations. There were 6 Austrian respondents: mixture of SMEs and research organisation from both, the public and private sector. Other frequently occurring (3-5 entries) countries included Bulgaria, Latvia, Poland, Portugal, Slovenia and Spain.

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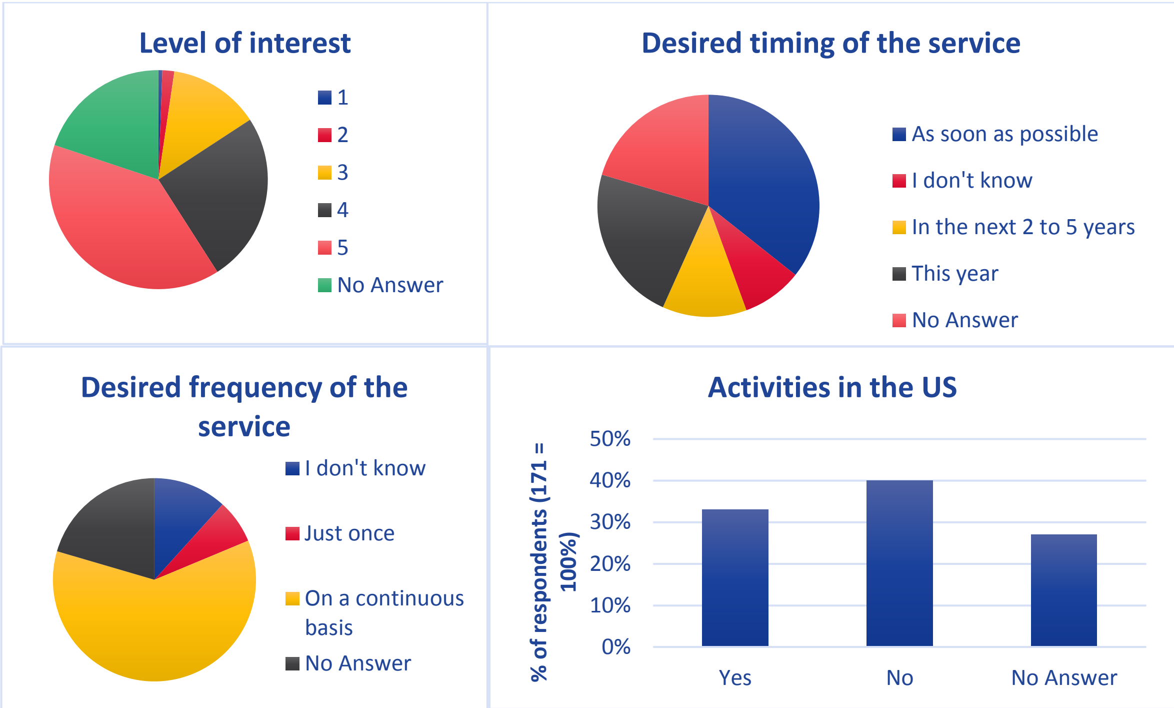


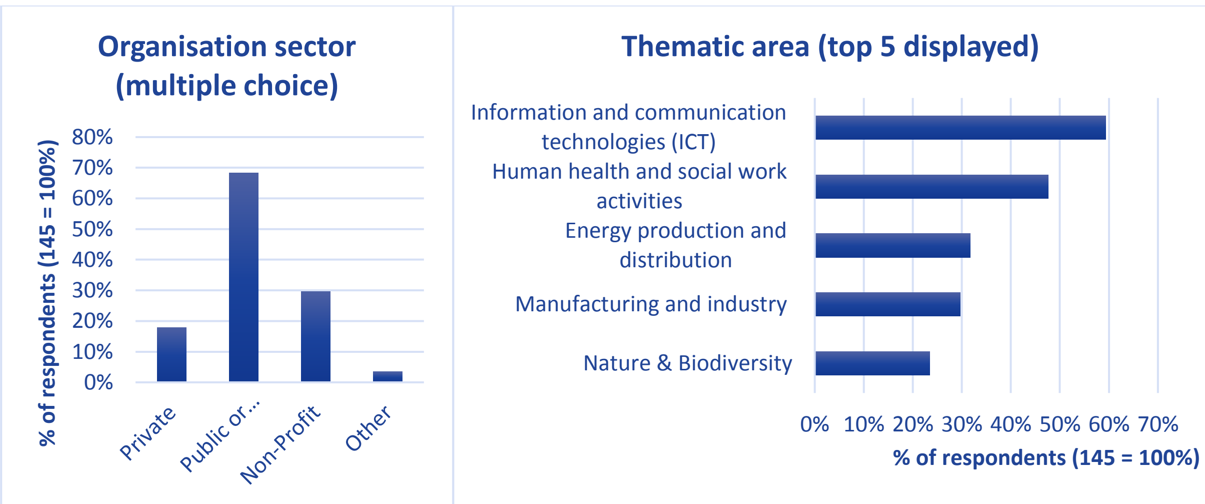
Figure 53: Step-by-step navigation answer details 2 (3 strands combined)

Conclusion: Step-by-step navigation on the Network's webpage

There is a high demand for this service: 171 respondents ticked it in at least 1 strand. Most respondents would like to use the service as soon as possible and on a continuous basis. This may be due to the budget constraint of the potential customers: it is less costly than travelling to the US, and could serve as a good introduction to collaboration with the US.

Digital tools ('Online education modules', 'Webinars', 'First – Aid Information Kits')

In total, there were 145 (from all the 3 strands, counting the respondents only once) potential customers interested in various digital tools. There was more interest amongst research type of stakeholders than businesses, which is also reflected in the ranking of the service: in B2B it ranked much lower than R2R or R2M.



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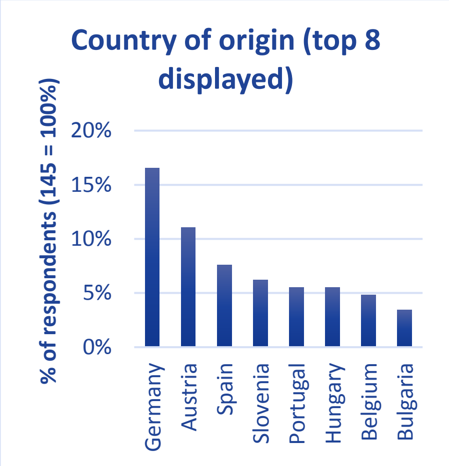


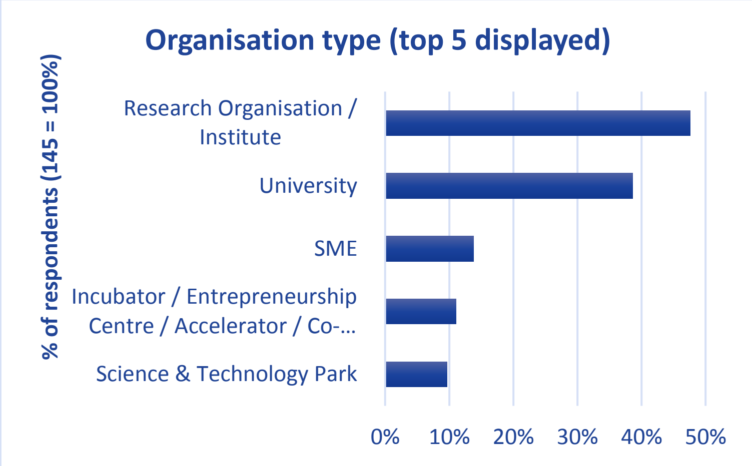


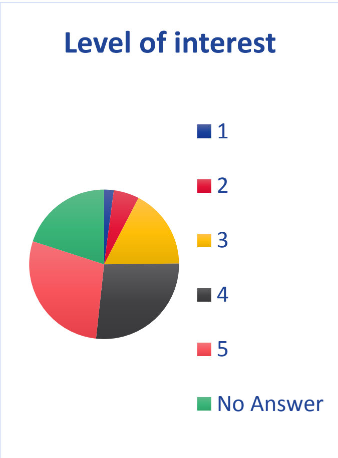
Figure 54: Variety of digital tools for sectoral / thematic information on EU – US business collaboration answer details

The same trends could be observed for all three sub-services. 50-60% of respondents are highly interested (4-5 level of interest). The proportion of those who would like to use the services only once a year are negligible, therefore the services need to be developed so that the end-users have access to it few times a year/ on a continuous basis. The majority of those who responded to this question, would like to access the service either as soon as possible, or this year, thus there is an urgent demand.

Some of the 15 most highly interested potential customers (who selected level 4-5 of interest and are demanding the service frequently and either as soon as possible or this year) are largely research type of organisations, research networks (intermediaries) or universities, with only 2 SMEs present. Amongst them were 5 Spanish organisations, 4 Hungarian, 2 Finnish and 2 Irish.

The following sections provide graphs for different sub-sets of digital tools.

<u>First – Aid Information Kits' (comprise of a set of handy, easy-to-follow guidelines with essential information on entering the US market)</u>



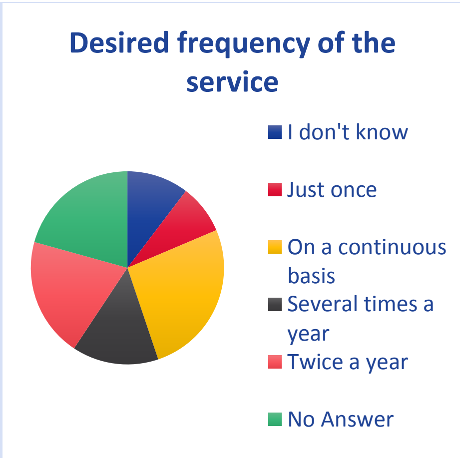


Figure 55: Sectorial / thematic studies answer details

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Webinars on research and innovation sectorial / thematic areas of EU-US collaboration (8 webinars highlighting the critical aspects of analysis/studies or challenges put forward by clients)

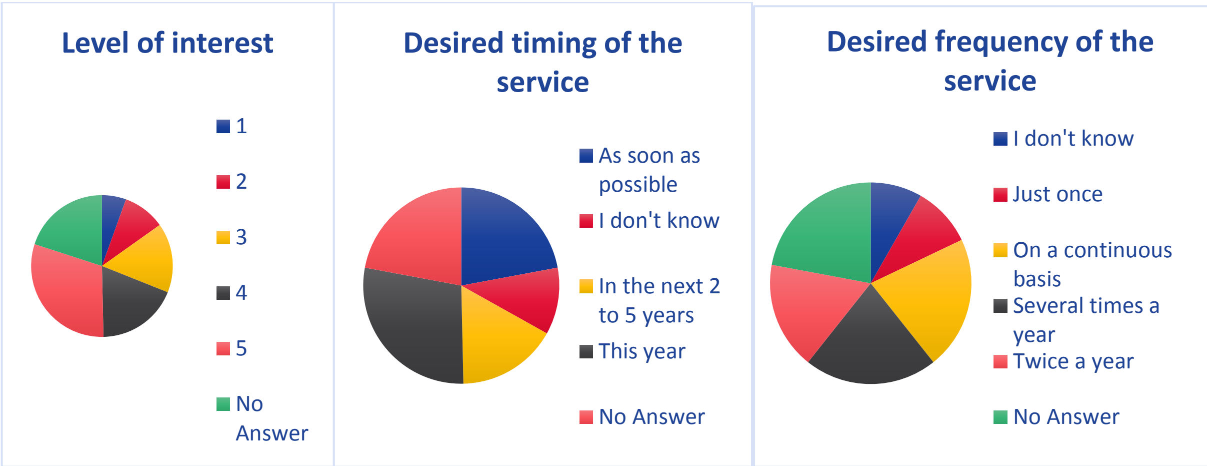

Figure 56: Webinars answer details

Online education modules on sector specific topics related to market entry issues, or steps to establishing collaborations

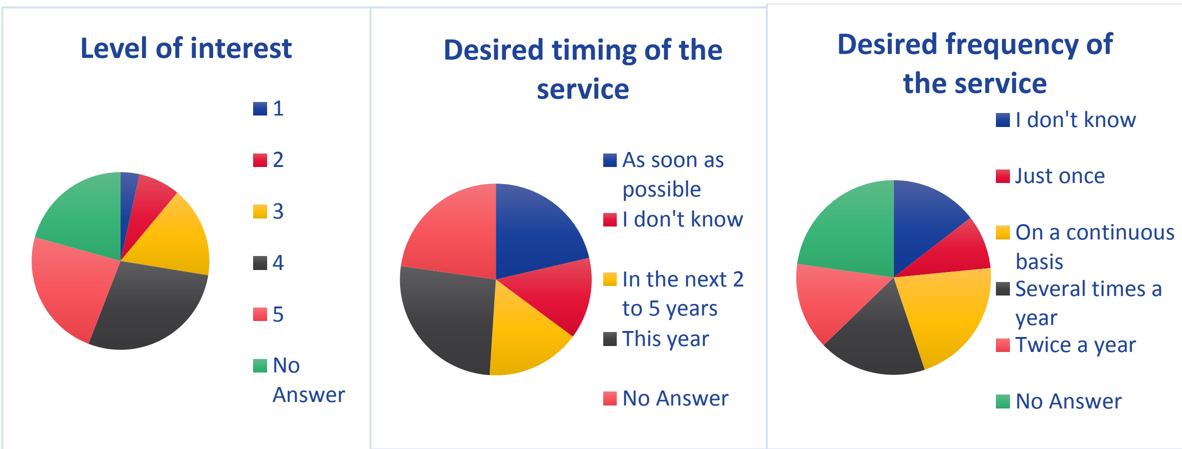

Figure 57: Online education modules answer details

Conclusion: Digital tools ('Online education modules', 'Webinars', 'First – Aid Information Kits')

There is a relatively high demand for this service: 145 respondents ticked it in at least 1 strand. Most respondents would like to use the service as soon as possible/this year and on a continuous basis. The interest in the 3 subservices is almost equivalent. 55% of respondents were highly interested (level 4 or 5) in First-Aid information kits, most of them want to get access either as soon as possible or this year and 26% want to use it on a continuous basis. A little less, 49% rated Webinars as 4 or 5, again most want to get access to it very soon, and 21% would like to use it several times a year. 51% rated online education modules as a 4 or a 5, most respondents need it very soon and 21% would like to use it on a continuous basis. It is mostly public organisations, and research type organisations/ universities, that are interested in this service.

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Providing work space

Work space for R2R

In total, 60 respondents expressed interest in getting work space, called as 'Work space and infrastructure for public and private European Organisations' in the R2R stream in the survey. 72% (43/60) marked themselves as a "Public or Government owned", 18% (11/60) as "Private", 30% (18/60) as "Non-Profit", and 2% (2/60) as "Other". There is a 5% deviation in the proportion of Private organisations interested in this service compared to the R2R general statistics. Regarding organisation type, there is once again a dominance of Research Organisations/Institutes and Universities with 29 (48%) and 21 (35%) respondents respectively. However, there is a relatively high presence of other type of organisations as well, such as SMEs (6% deviation), Science & Technology parks, and Incubators.

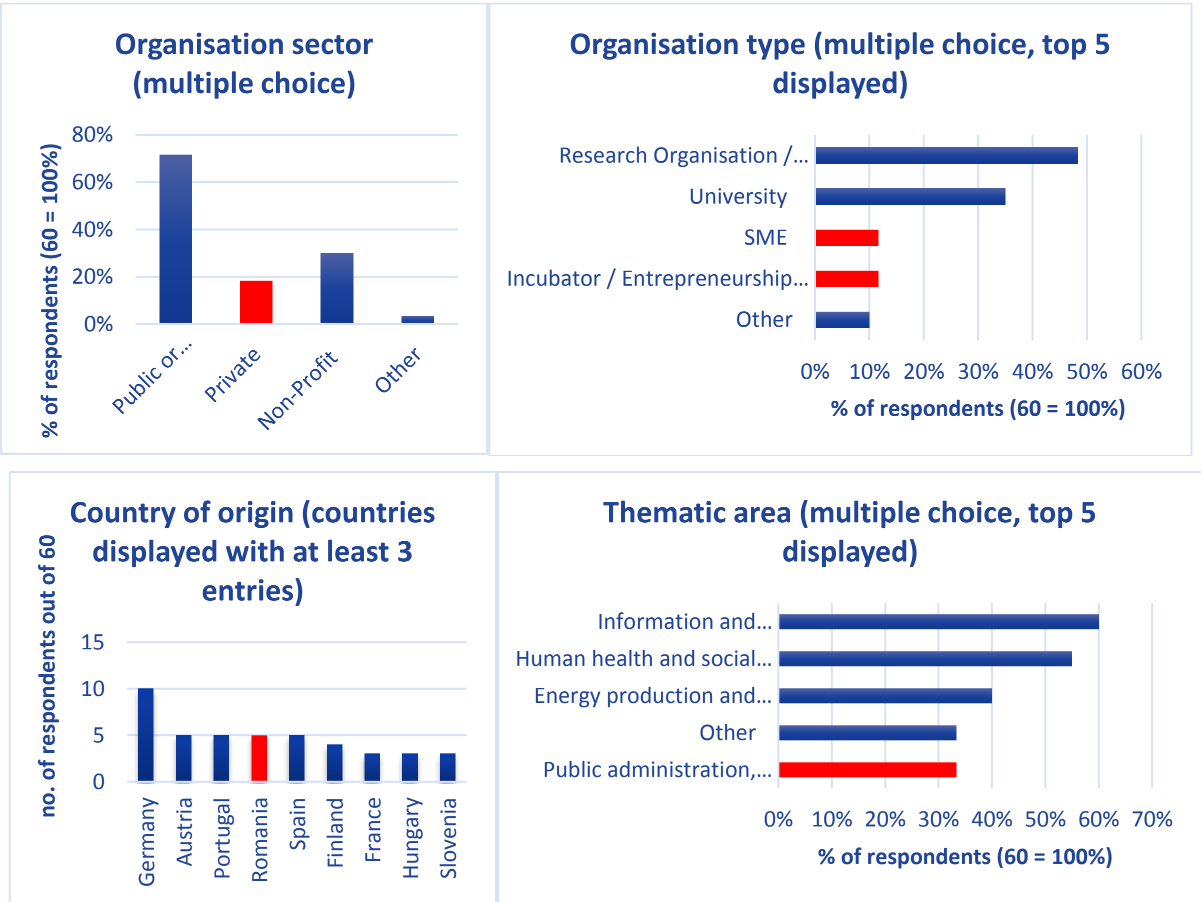

Figure 58: Providing work space survey answer details

The table above depicts all the countries with at least 3 entries. Romania is unusually high on the list, with 5/8 Romanian respondents of the survey being interested in this service. As for thematic areas, it is largely in line with the general R2R Thematic trend: ICT largely dominated with 36 respondents being active in this sector, while Human Health services are ranking second with 33 respondents. However, one thematic stands out: the proportion of organisations that are active in Public administration, security and defence, is unusually high, ranking as 5th with 20 respondents, whereas in the general statistics it is the 10th, suggesting that Public administration, security and defence organisations from European countries need working space in the US.

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60% of respondents (36/60) are "very interested" in the service (Level of interest marked as 4 or 5). Regarding the frequency of the service, the results suggest that most respondents are interested in gaining access to work space and infrastructure several times a year, thus, the demand associated to this service is to be considered in the long run: the service should be formatted so that the relationship with the 'customer' is continuous in time for answering to its need & ensuring it throughout the year.

Responses are more diverse regarding the timing for the launch of this service. Most respondents (18/60) would like the service to be available as soon as possible, however (17/60) prefer accessing it in the next 2 to 5 years. Regarding the location, the answers are split about evenly in between respondents who prefer West Coast (18/60), and those that prefer East Coast (20/60). For most (24/60) respondents however this does not matter, meaning they would be satisfied either way.

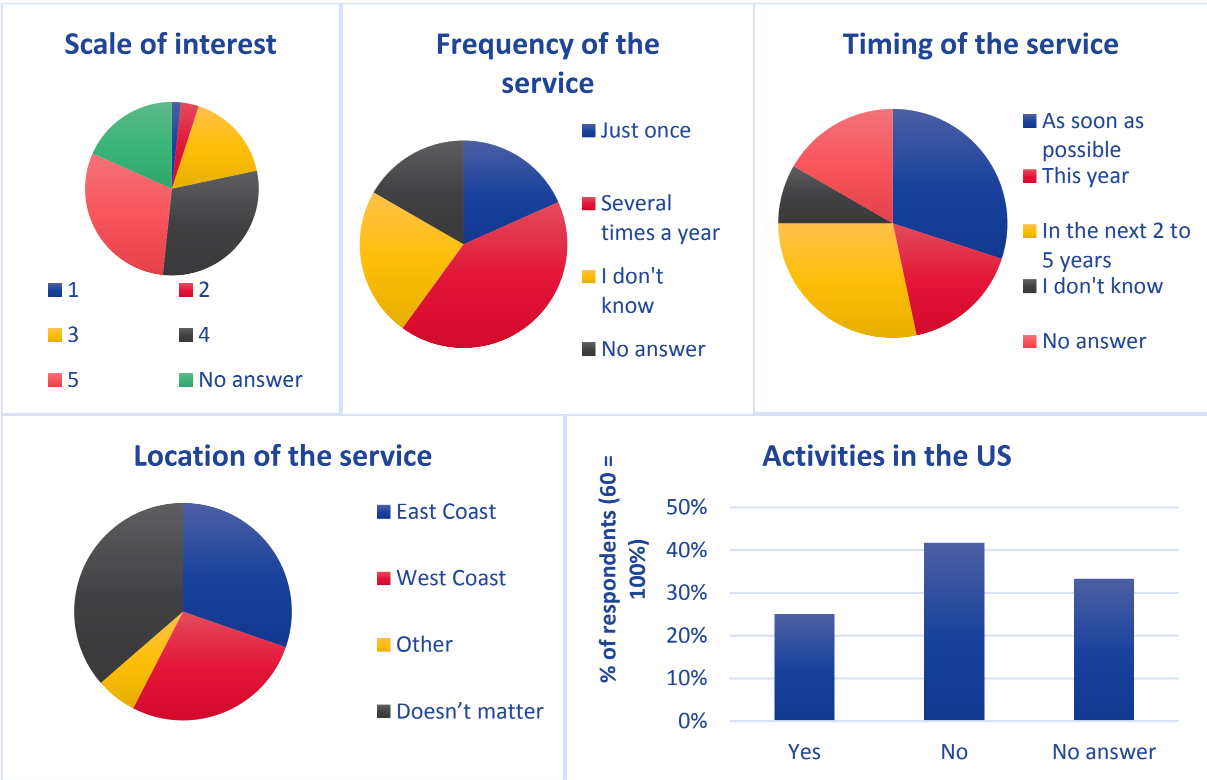

Figure 59: Providing work space survey answer details 2

Work space for R2M

59 respondents are interested in this service. There are slightly more SMEs and less Research Organisations and Universities, a lot of respondents from Hungary (10%), and a little more organisations involved in Human health related fields compared to the R2M strand statistics.

Among the interested respondents the level of interest is high, however there is a split opinion as to whether use it just once or several times a year, and approximately the same number of respondents hold a preference for East Coast, as do for West Coast, while for most, the location does not really matter. Furthermore, more than half of all respondents would like to use the service in the next 2-5 years.

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There are 14 respondents who would like to access the service straightaway or this year and have a high level of interest. Almost 80% of them are public organisations, and most of those 80% are Research organisations or universities, such confirming R2R conclusions for this service.

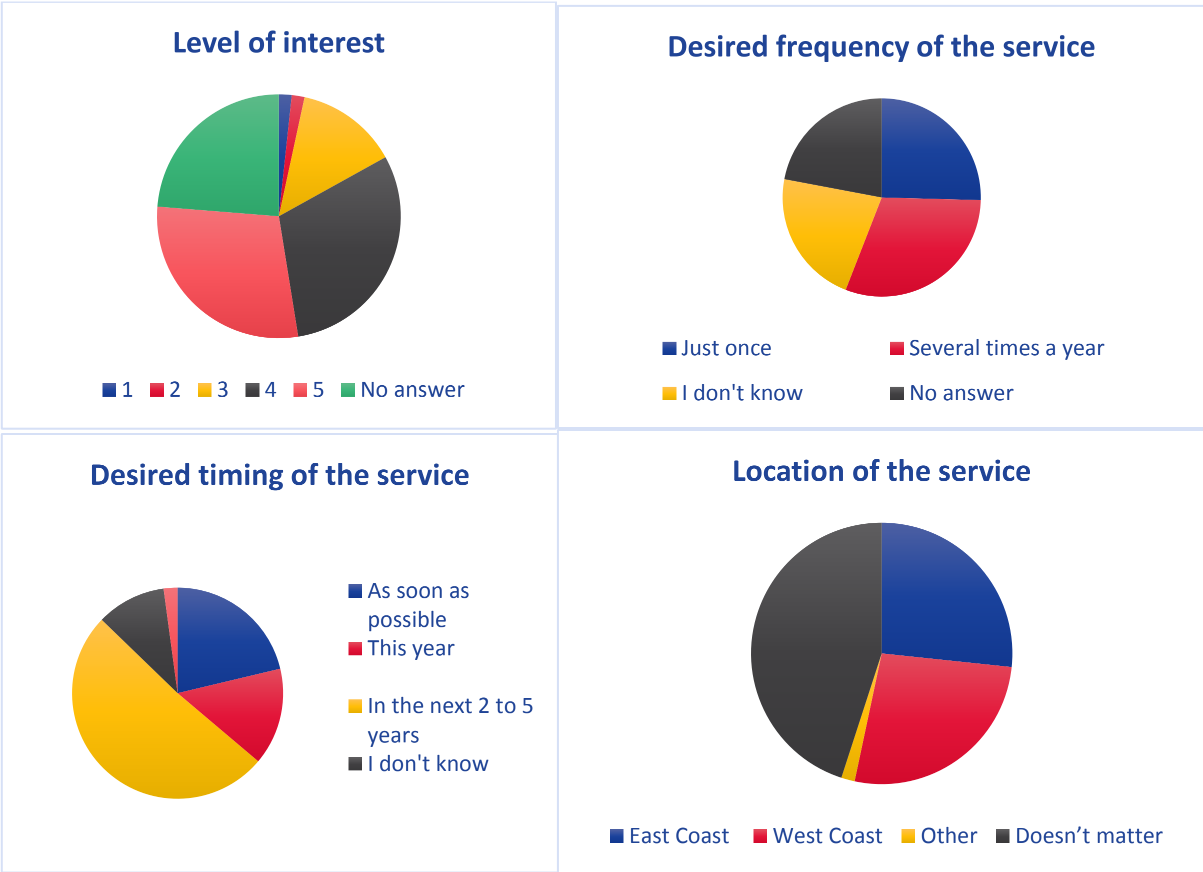

Figure 60: Providing work space for R2M answer details

<u>Work space for B2B</u>

48 respondents were interested in the question called ‘Work space and infrastructure for public and private European organisations in the US’. 44% of the respondents are public organisations, however the percentage of respondents who are SMEs, Incubators/Accelerators and/or Start-ups is higher for this service compared to other B2B services. The distribution of countries is a little different as well: there were a lot of respondents from Germany and Hungary and less from Austria. There was a high proportion of organisations that are active in fields related to human health, manufacturing and industry and energy production. There was an unusually high percentage (27%) of organisations involved in Public administration, security and defence.

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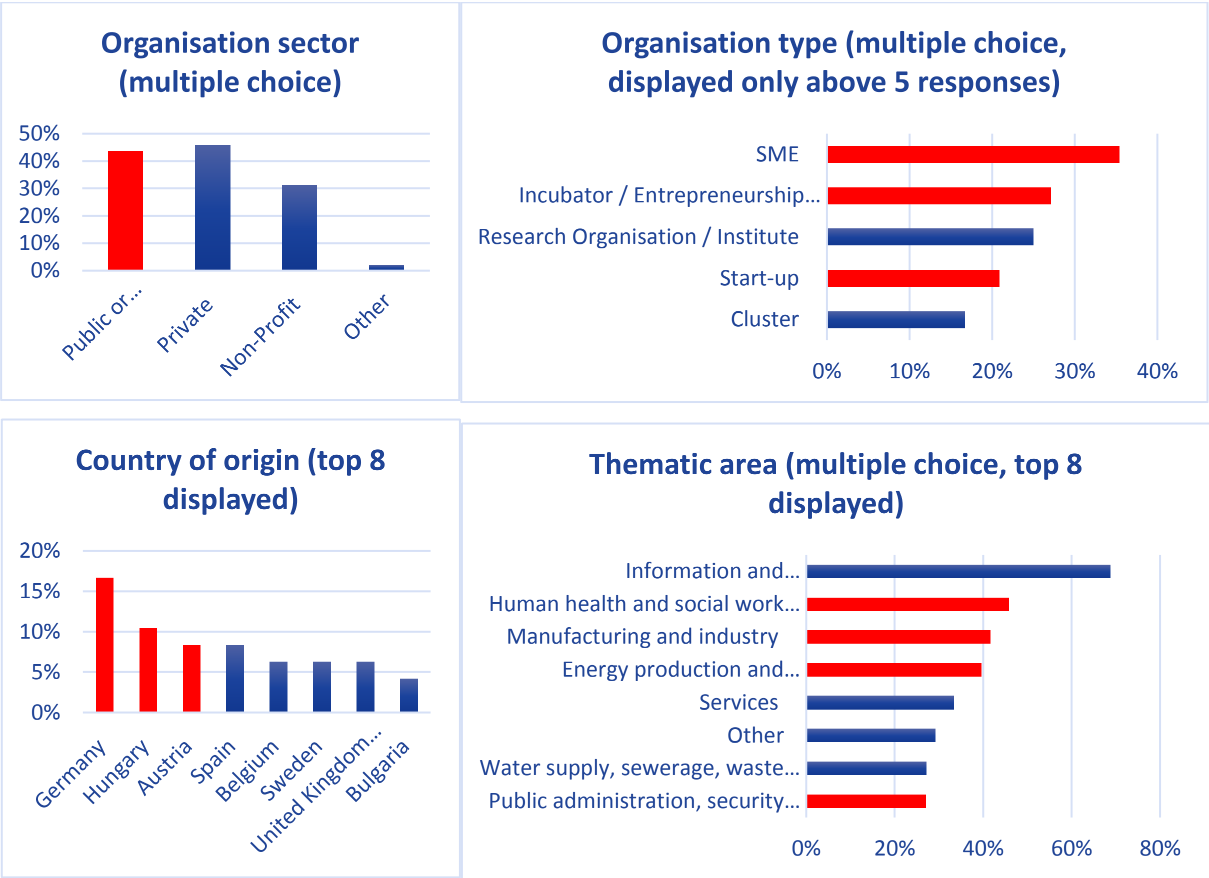

Figure 61: Work space for B2B answer details

Most respondents who expressed interest in this service are highly interested in it (4 or 5) and would require it this year or in the next 2 to 5 years.

For most respondents, it does not matter whether the service will be proposed on the East or the West Coast, and 42% of them do not have any activities in the US yet. Some of the responses of those who had a preference for the West Coast specified interest in Los Angeles, Silicon Valley, San Francisco, Palo Alto, while those for the East Coast put down New York, Boston and Southern Florida.

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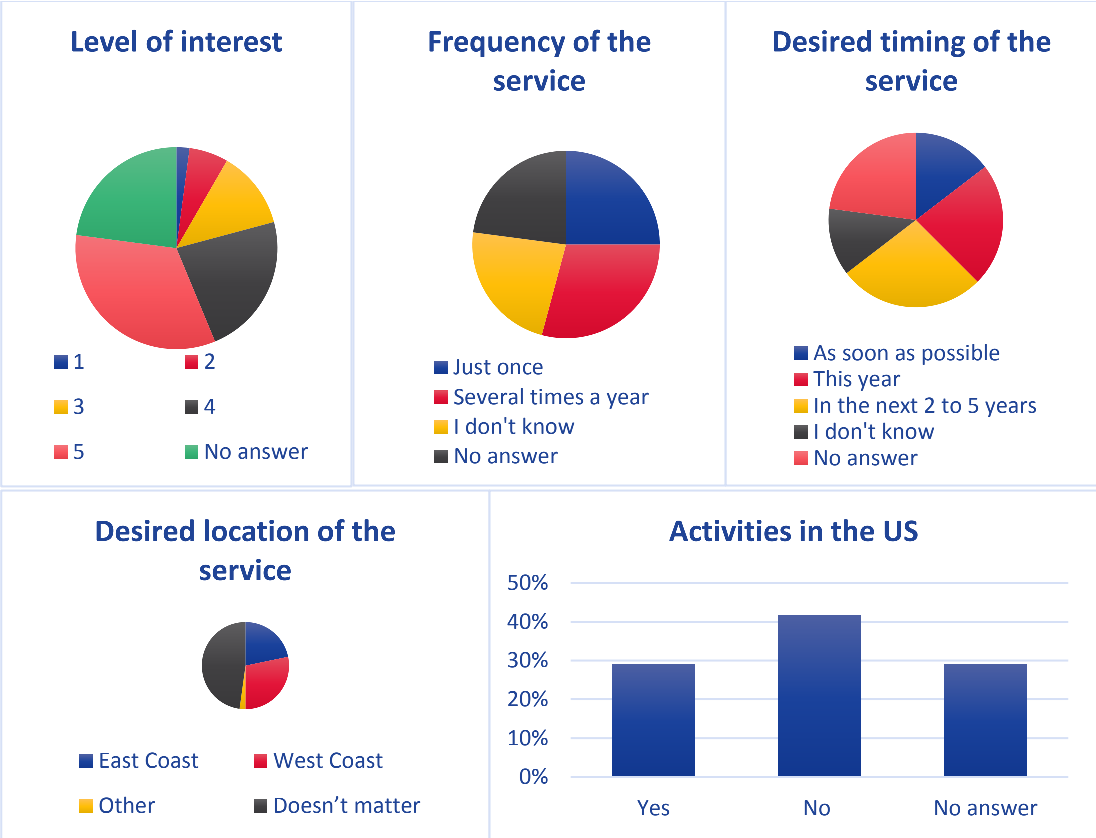

Figure 62: Work space for B2B answer details 2

Conclusion: Work space

Overall, it can be concluded from the survey that work space is not a priority for R2R respondents. The majority of the respondents are from the Public sector, working in Research Organisations and Universities. While 36% of R2R respondents is indifferent on the location, the rest is split equally between West Coast and East Coast in their preference.

However, providing a physical office space was pointed out by several interviewees as a very valuable potential service. In particular, this physical office space could provide support to European start-ups to access the American market, and providing a platform for accessing relevant partners and new research areas.

The fact that respondents are ICT, Human health or defence centric respondents do not provide the authors with information on the type of work space needed. Indeed, there is no possibility to assess if the work space wanted are labs or 'common open spaces'. From the authors point of view, further investigations on the type(s) of work space are thus needed.

There were unusually many organisations working in the Thematic of Public administration, security and defence, in both, 'Work Space for R2R' and 'Work space for B2B' service. It should be considered for the design of the service to exchange with public administrations in different EU countries on their needs of work/office and representation space.

On the B2B side, collaborating with European intermediaries (incubators, accelerators, etc.) notably German and Austrian ones, could foster the interest and thus success of such structures, also confirming the interest for NearUS pilot developments.

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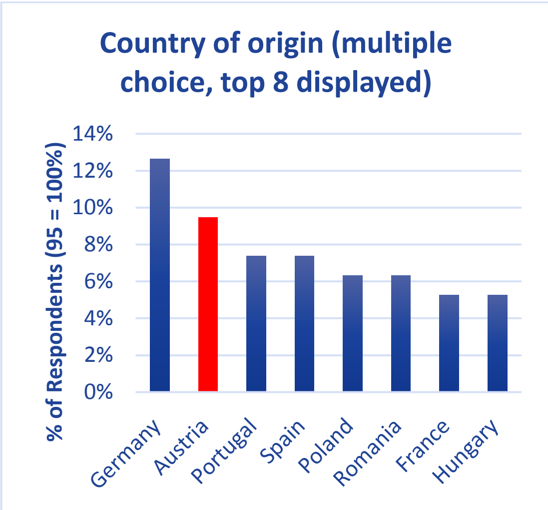
Training Events

Training events for R2R

95 respondents expressed interest in this service named as 'Training Events on "How to internationalise with the US", providing information on markets, IP management, regulatory issues, cybersecurity, export/import control, etc.' in the survey. There were slight deviations from the general R2R trend, as displayed in the graphs below. The proportion of organisations active in the top 6 services was considerably higher. This suggests that the firms that are interested in these services are likely to be active in multiple domains. Unusually many firms are also active in Water supply and related fields and Public administration, security and defence.



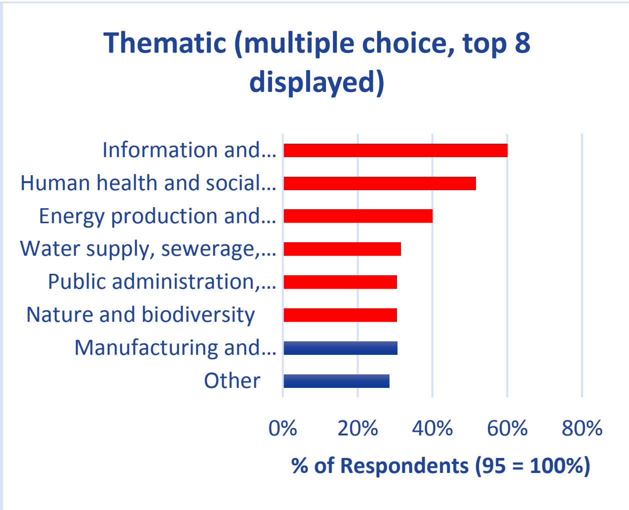


Figure 63: R2R Training events survey answer details

The majority of respondents is highly interested in the service, would like to take part in training events several times a year and start "as soon as possible" or this "year".

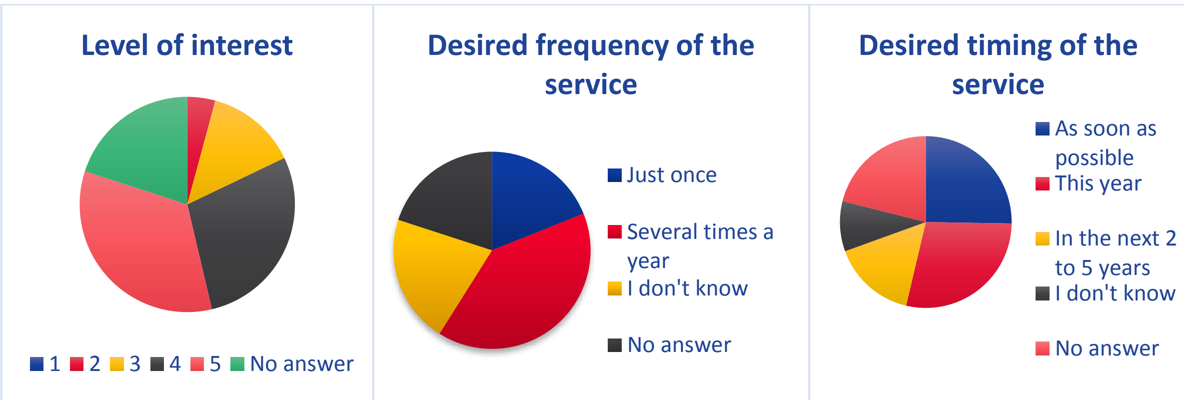


Figure 64: Training events survey answer details 2

Regarding the location, 43% would like the training events to take place in Europe, while 34% would be happy if they took place in both, EU and US. 39% of respondents do not have activities in the US yet, 23% already do. Most (45%) of the respondents are willing to pay between 200€ and 400€ per training event while 15% are willing to pay between 401€ and

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600€, very little (1%) are willing to pay more. As for the content of these events, 73% expressed an interest in meeting regional stakeholders aside these training events.

Figure 65: Training events survey answer details 3

<u>Training events for R2M</u>

91 respondents expressed interest in the service named as 'Training Events on "How to internationalise with the US", providing information on markets, IP management, regulatory issues, cyber security, export/import control, etc.' in the survey. Compared to the R2M general statistics, there were relatively less (15%) Private organisations interested, and relatively more Non-Profits (33%). There were also relatively more organisations that are involved in ICT (66%), Public administration, security and defence (36%) and fields related to Water supply, Nature and Agriculture (32% each), suggesting that in general the interested respondents are likely to be involved in more than one thematic field.

Most respondents display a high level of interest (4/5) and would like the events to take place in the European Union or both the EU and US. The answers are diverse regarding the frequency and timing of the service, many would like to use the service just once, while others several times a year and while 46% would like to access the service this year or as soon as possible, 19% would need it in the next 2 to 5 years. The majority (63%) of respondents signalled that they would like to meet regional stakeholders in matchmaking events aside these events.

Out of the 16 most interested and demanding respondents, most are public or government owned and largely research type of organisations, with a few exceptions, like a Non-Profit cluster from France, an innovation agency from Germany or a private SME from Hungary.

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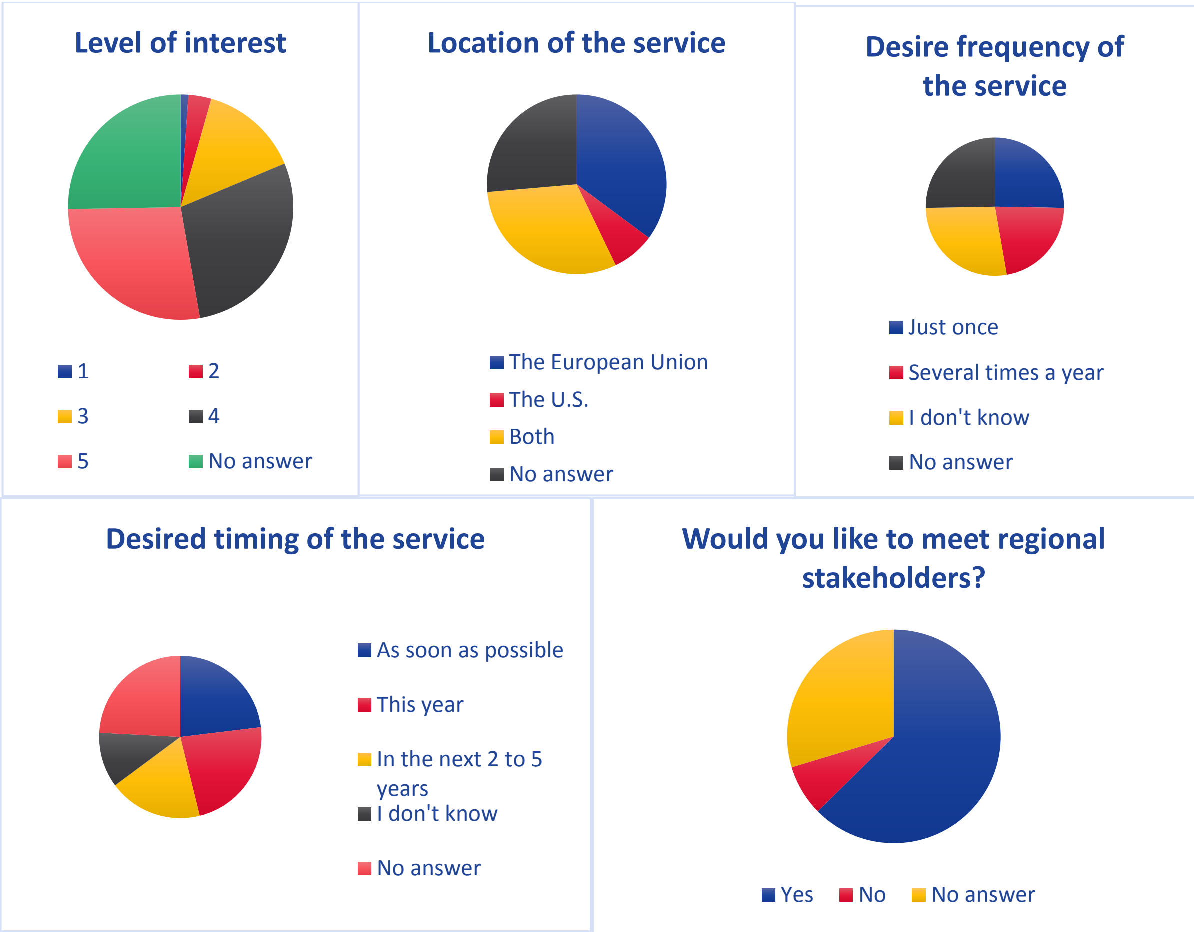

Figure 66: Training events for R2M answer details

<u>Training Events for B2B</u>

57 respondents were interested in the service named as 'Training Events on "How to internationalise with the US", providing information on markets, IP management, regulatory issues, cybersecurity, export/import control, etc.' in the survey. The deviations from the general B2B strand statistics were as follows: there were relatively speaking somewhat more (25%) Incubators/ Accelerators and organisations involved in ICT (67%) and Human health (39%) related fields, and less respondents from Belgium (2% compared to 7%).

61% of respondents marked either 4 or 5 as their level of interest. The answers are split between those who would like to attend training events several times a year (28%) and those who would like to attend only once (26%). Regarding the location, there is an obvious majority (44%) of those who would like the service to take place in the EU, while 25% are interested in both locations, however only 9% have a preference for the training events to take place in the US. The responses are inconclusive regarding the timing of the service: respondent have different needs, some would like to attend such events in the near future, while others would prefer in the next 2 to 5 years. A substantial proportion of respondents (72%) would like to meet regional stakeholders in matchmaking events aside these events.

Amongst the 15 most highly demanding respondents, there are numerous SMEs, start-ups and scale-ups but also many intermediaries, such as Clusters, Chambers of Commerce and Business Networks.

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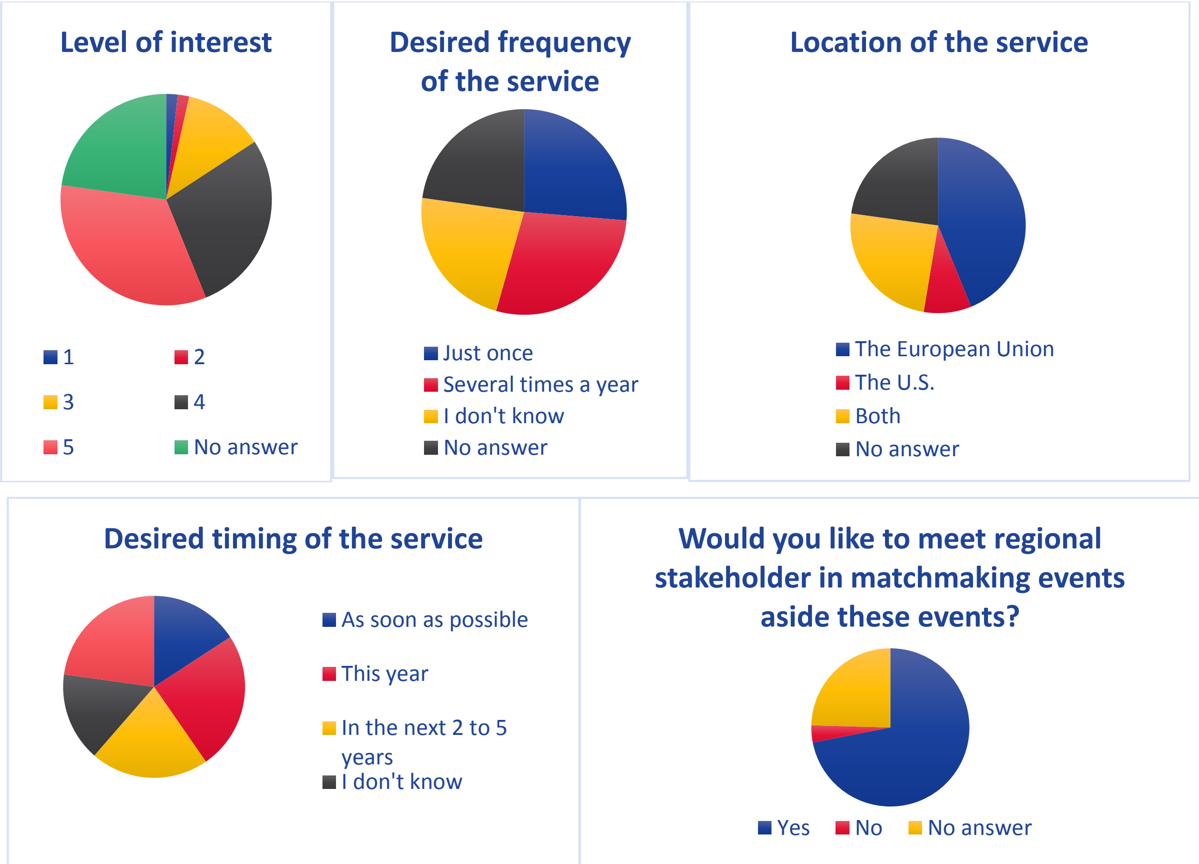

Figure 67: Training Events for B2B answer details

Conclusion: Training events across strands

Overall there is a moderately high interest for training events in all 3 strands, being at the 6-7th "rank" in all 3 strands. Regarding the rating, frequency and timing of the service, all 3 strands expressed high level of interest, and a lot of them are willing to attend such events very soon, however 'Training events for R2R' seems to be the most demanded service. There is a clear preference in all three strands for holding these events in the European Union, very little respondents chose US. There was also a very high interest in meeting regional stakeholders in matchmaking events aside these events, thus outlining that regional anchorage of the content definition and speakers is essential for answering to the respondents' needs. Intermediaries such as Chambers of Commerce, Clusters, Accelerators, etc. should be involved in the planning process.

Media promotion service

In total 63 respondents were interested in this service. Overall, mostly public organisations were interested, however 29% of the respondents are private organisations, whereas in the statistics of the 318 survey respondents the % of private organisations was only 23%. Similarly, 19% of respondents were SMEs, whereas this was only 12% for all the 318 survey respondents seeking for support in the US. Thus, in relative terms, a lot of private organisations and SMEs have shown interest in this service.

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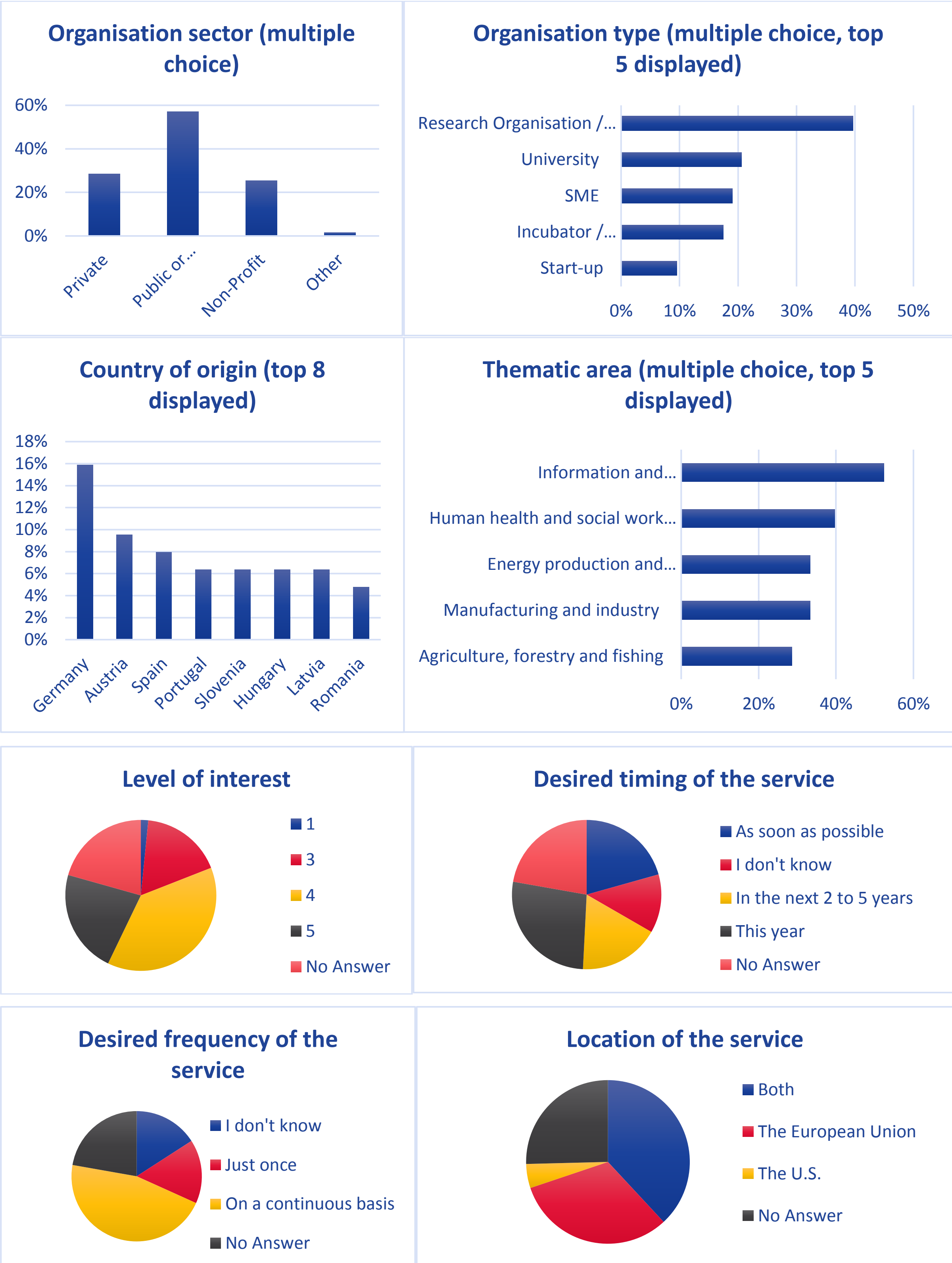

Figure 68: Media promotion service answer details

The majority of respondents rated the service at 4 and demanded it either this year or as soon as possible, on a continuous basis. It is clear that the service needs to be developed in the EU or the EU and the US. For "US only" the demand is very low, with only 3 out of 63 respondents

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marking it as their optimal choice. The 10 most interested respondents (rating the service at 5 and wanting it on a frequent basis and soon) are a mixture of public Research organisations from countries such as Portugal, Slovenia and Hungary, and private Start-ups and Scale-ups from countries such as Bosnia and Herzegovina, Austria and Slovakia.

Conclusion: Media support

Overall, this service ranked as the least demanded one in all 3 strands. However, the ones who did demand it, seem to be quite interested and eager to use it in the near future and on a continuous basis. Amongst the most interested respondents there were public Research organisations, as well as private Start-ups. If the service is developed, it needs to be located in Europe or both, Europe and US, since there were very little respondents interested in travelling to the US for accessing it, understandably due to budget and time constraints.

4.5.1 Interview elements

R2M and B2B Interviewees identified the digital tools for sectoral/thematic information on EU-US business collaboration, the guidelines and information on the US innovation and business landscape, list of key-contacts etc. facilitating collaborations with the US counterparts, the Media Promotion Service, and the Training Events on “How to internationalize with the US” as main needs for support in market activities targeting the US.

Another aspect mentioned by several interviewees concerns the legal and administrative regulations for developing cooperation at the R2R, R2M and B2B levels. In particular from the business side, setting a business is considered to be a burden for European organisations, needing to understand what are the main legal options that should be considered and assessing the structure of the IPR for the different products or services.

As most of the private organisations interviewed were either SMEs or start-ups, many pointed out that understanding the general law when setting-up a business is key for obtaining success in the US market. In particular, obtaining feedback from opinion leaders in the specific sector in which the company operates may lead to a better understanding of the main challenges and opportunities in the R&I collaboration process. Accessing these opinion leaders may also lead organisations to make less mistakes when initiating the R&I collaboration process with the US. Thus, having a poll of experts and opinion leaders available to support the potential clients should be taken into account when designing the Network’s services. This is where the individual character of the boot camps which bring participants in direct contact with major stakeholders of their field should again be mentioned when promoting this service.

Some interviewees also stated that there should be services related to supporting the establishment of a subsidiary in the US. In particular, the interviewees highlighted that it would be good to have a representative that could act as an advisor in the US market and guide every step of the process on what needs to be done to establish the R&I cooperation. The development of a “mentor” service should be considered.

Furthermore, the provision of office space was also stated as an important service to be provided by the Network. This office space should be associated with matchmaking actions that could provide good contacts and opportunities for the European organisations. Thus, marketing support services activities are also seen as relevant in order to pass the right message to the US market and allowing to get in contact with potential partners for developing R&I activities.

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4.5.2 Synthesis of the segment

Table 7: Transversal services ranking and associated remarks

Rank	Service	Stakeholder types interested	Remark
1	Online services	All stakeholders	A large majority of potential customers wants this service as soon as possible and on a continuous basis; No clear trend on the types of stakeholders, nor their origins.
2	Training Events	All stakeholders	Most interested respondents would like to take part in training events several times a year and start "as soon as possible"; 40%-50% would like the training events to take place in Europe, while 30%-40% would like these to be both in the EU and the US; Localisation in the EU matters: most respondents are also interested in meeting with regional R&D&I stakeholders aside these training events; 45% of the respondents are willing to pay between 200€ and 400€ per training event; Intermediaries such as Chambers of Commerce, Clusters, Accelerators, etc. should be involved in the planning process for ensuring dissemination & participating in localisation contents; Localisation in the US do not follow a clear trend (East / West are equally represented in the results).
3	Digital tools	R2R stakeholders	The interest in the 3 subservices is almost equivalent
4	Work space	Research Organisations /Institutes; Universities; SME; Start-ups; Accelerators	Moderate interest according to survey results, but in contradiction with interviewees' feedbacks which are more positive; For most respondents, it does not matter whether the service will be made available on the East or the West Coast, and 42% of them do not have any activities in the US yet; On the B2B side, collaborating with European intermediaries (incubators, accelerators, etc.) notably German and Austrian ones, could foster the interest and thus success of such structures.
5	Media promotion service	All stakeholders	Moderate interest according to survey results, but in contradiction with interviewees' feedbacks which are more positive; Service to be developed in the EU in the near future and on a continuous basis. *May be reconsidered and / or reframed, e.g. towards "marketing service targeting the US"*

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5 Budgetary considerations

A section of the survey was dedicated to assessing the respondents' potential "willingness to pay" for the services. In order to do so, respondents were asked to select up to 3 services in the survey on which they would invest the most amongst the services previously selected, and associate a yearly budget they were ready to consider for accessing these services.

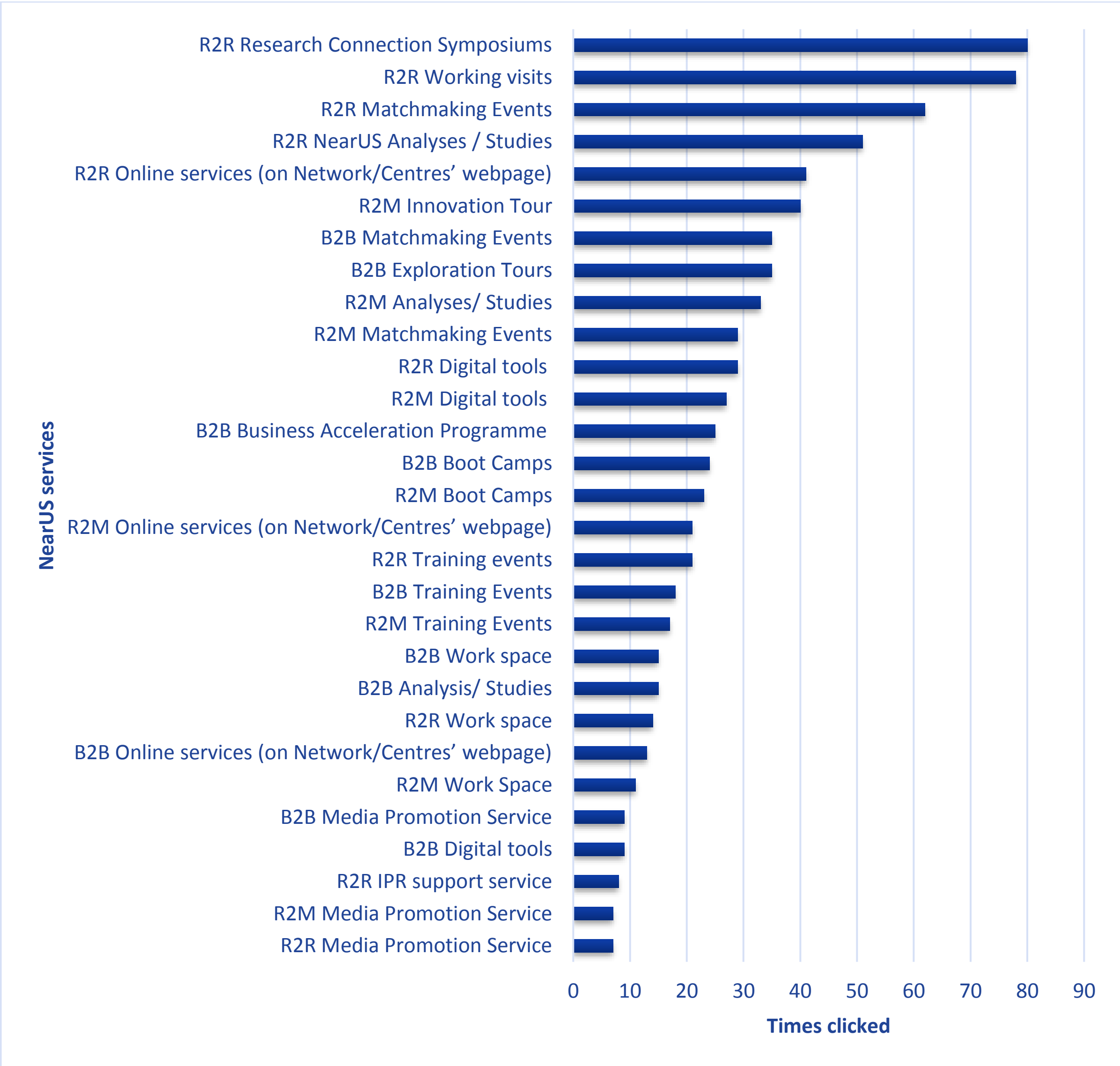

Figure 69: Investment potential of the NearUS services

In

Figure 69: Investment potential of the NearUS services, the top services are displayed based only on the first part of the question, thus selecting up to 3 services that they would invest the most in. It must be kept in mind however that the results are somewhat biased since there were largely more R2R respondents (203) than B2B respondents (109), so the top choices are evidently R2R services.

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The service with the highest investment potential is Research Connection Symposiums, followed by R2R Working visits and R2R Matchmaking Events. Within the B2B strand Matchmaking Events and Exploration Tours, while within the R2M strand Innovation Tour and Analyses/Studies stand out. It is worth noting that B2B stakeholders are less willing to invest in online tools compared to the other two strands: B2B Digital tools, B2B Online Services and B2B Analysis/ Studies ranked much lower than the same services in the other two strands. This might mean that business oriented stakeholders would rather invest their money into "face-to-face" services than digital tools.

86 respondents answered to the subsequent question, namely 'What yearly budget would you consider for accessing such services'.

However,

- 26 out of these 86 (30%) indicated they 'do not know' what numbers / answer to provide. Almost two-third of the latter come from public or non-profit sectors, logically less able to number / assess budgets in complex systems than private entities;
- 16% (14/86) did not consider any budget for accessing the services. In other words, this proportion corresponds to the responses '0€/$'.

Thus, the analysis on NearUS services 'potential revenues' are based on these 45 remaining responses which could be exploited. These 45 remaining respondents – those having provided an estimate of their potential investments - were divided into 3 groups (which account for 14% of the overall respondents 'seeking supports for their activities in the US'):

- 15 respondents who plan to allocate the highest annual budget to the services comparing to other respondents (group called 'Top 15 budget');
- 15 respondents who plan to allocate the lowest annual budget to the services comparing to other respondents (group called 'Low 15 budget');
- The 15 remaining respondents are in the group called 'Mid 15 budget'.

The profile of each of these three groups was analysed and is presented below:

Group "Top 15 budget"

About 50% of respondents willing to invest are from Public or Government owned organisations, from them 53% being research organisations. Interestingly, a bit more than half of this group respondents come from Germany and Austria and roughly 50% are involved in the field of ICT.

The distribution of services in which these respondents show interest is remarkably even between strands. To be noted, the 3 'top of the top 15' respondents all selected R2R-types of services only, two of them being involved in Human health and social work activities. Also, one respondent selected 9 'transversal services' on a total of 15 overall, thus biasing the conclusions for this type of services.

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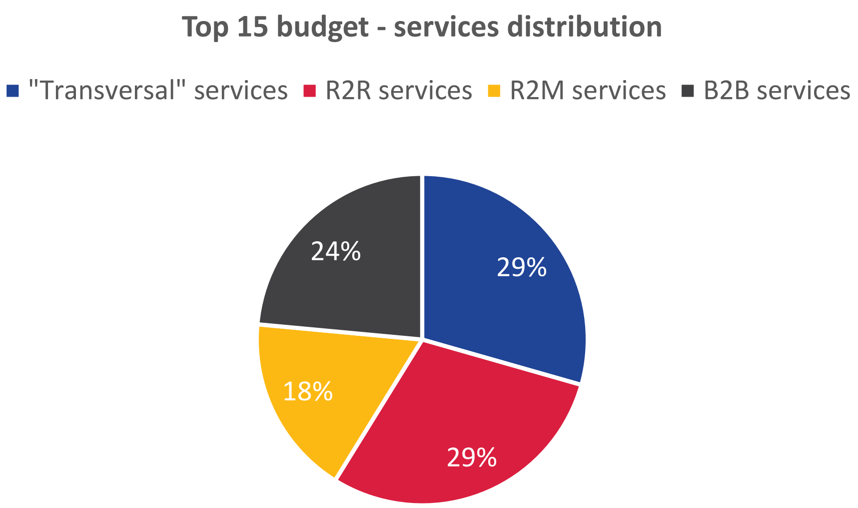

Figure 70: Strands distribution of services selected by « top 15 budget » potential end-users

Further classification of responses provides an overview of the top 3 services requested by this group's stakeholders, as in table Table 8: Top 3 services requested by the respondents from the top 15 group below). The strands-type services gather more absolute interest than transversal ones, with the exception of 'online services', which reach a certain level of success in the overall ranking.

Table 8: Top 3 services requested by the respondents from the top 15 group

R2R	R2M	B2B	Transversal
Research connection symposium	Matchmaking and Investor Pitch Events	Innovation Tours	Online services
Matchmaking events	Innovation Tours	Matchmaking and Venture Capital Pitch Events *and* Business Acceleration Programme	Media promotion service *and* Work space
Working visits	Bootcamps		

Combining potential investments with the different NearUS services selected by each of the 'Top 15' group stakeholders provide an overview of the average, minimal & maximal amounts of yearly budgets per service per strand (in euro) per capita. Although these numbers are not taking into consideration the proper costs of each service, they do illustrate the wide range of yearly amounts respondents could be 'willing to pay' for accessing these.

Table 9: Potential yearly investment per service per strands from top 15 group*

	Average	Min	Max
R2R	21 151 €	1 389 €	75 000 €
R2M	11 065 €	1 389 €	20 000 €
B2B	8 565 €	1 389 €	20 000 €

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Transversal	7 341 €	1 389 €	16 667 €

** This table takes into account 14 answers out of the "Top 15 budget" group due to a probable mistake in yearly investment estimate from one respondent (namely 1 000 000€ for one service).*

Moreover, data in the table above should be considered with precaution, notably regarding the following issues:

- *The number of respondents to this section is just enough for drawing statistics that can be considered as relevant;*
- *Companies are usually conservative with projections;*
- *Researchers are usually dealing with anticipations of public funding, so the numbers are rather "speculative";*
- *Public agencies might have put their annual budget per agency (not per service), which potentially induces another bias in this analysis.*

Group: Mid 15 budget

75% of the respondents from this group are from Public or Government owned organisations, a large part of the respondents' tasks revolving around research valorisation (from within Universities, agencies, networks or similar).

Given the respondents' types, the distribution of services is logically imbalanced and thus more R2R and R2M oriented. However, one respondent selected 9 out of the overall 14 transversal services for this group.

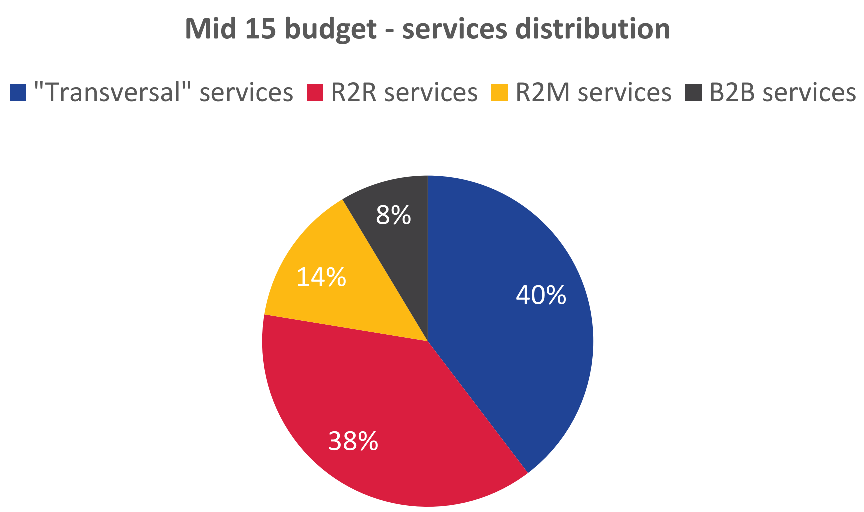

Figure 71: Strands distribution of services selected by « mid 15 » potential end-users

Further classification of responses provides an overview of the top 3 services selected by this group's stakeholders. The strands-type services gather more absolute interest than transversal ones, with the exception of 'online services', which reach a certain level of success in the overall ranking.

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Table 10: Top 3 services requested by the respondents from the mid 15 group

R2R	R2M	B2B	Transversal
Working visits	Thematic / sectorial studies	Innovation Tours *and* Matchmaking and Venture Capital Pitch Events	Training events
Research connection symposium	Exploration Tours	Business Acceleration Programme	Online services
Matchmaking events	Matchmaking events		Work space

The ‘Matchmaking events’ and ‘Business acceleration programme’ rank particularly low in this group, which is quite unexpected regarding its structure. On the other hand, transversal ‘Training events’ and ‘Online services’ are voted in.

Table 11: Potential investment per service per strands from mid 15 group

	Average	Min	Max
R2R	947 €	500 €	1 667 €
R2M	2 317 €	500 €	10 000 €
B2B	2 366 €	714 €	5 000 €
Transversal	1 252 €	500 €	2 667 €

The average potential investments are undeniably lower than for the ‘top 15’ group. This is notably due to the fact that this group has more homogenic amounts than the previous one, thus, numbers are reflecting realistic predictions (standard deviation being remarkably low).

Low 15 budget

This group is more ‘diverse’ than the two previous ones, in terms of sector, types & areas of activities.

Only one respondent selected R2M services. Transversal ones on the other hand are relatively overrepresented. This is probably due to the fact that respondents having conscience their budget is limited, they cannot pretend accessing to the ‘apparently costly’ ones such as tours or business acceleration programmes.

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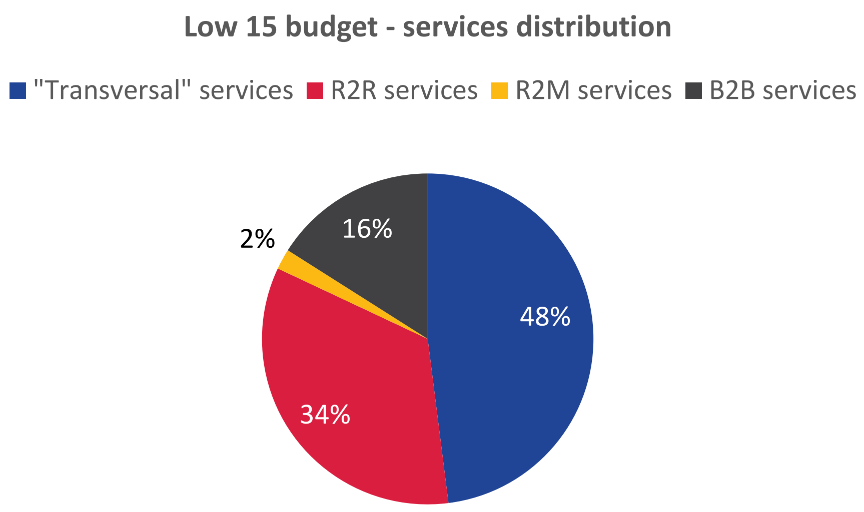

Figure 72: Strands distribution of services selected by « low 15 » potential end-users

Further classification of responses provides an overview of the top 3 services selected by this group's stakeholders (except for R2M). To be noted, the transversal service 'Training events' are extremely voted in by respondents, followed by "online services". The latter being online, there is no need to consider geographical distribution of respondents. For 'Training events' however, the wide distribution of this group does not enable to set a target region more than the other ones. Indeed, excepted 3 Austrian, the other recurring countries are France, Spain, Latvia and Hungary, which gather an equal number of respondents.

Table 12: Top 3 services requested by the respondents from the low 15 group

R2R	R2M	B2B	Transversal
Research connection symposium		Exploration Tours	Training events
Thematic / sectoral studies	Thematic / sectoral studies	Matchmaking and Venture Capital Pitch Events	Online services
Matchmaking events		Business Acceleration Programme *and* Bootcamps	Digital tools

Table 13: Potential investment per service per strands from top 15 group

	Average	Min	Max
R2R	224 €	40 €	500 €
R2M	*100 €*	*100 €*	*100 €*
B2B	678 €	67 €	1 500 €
Transversal	182 €	40 €	500 €

As a conclusion of this group, the lower the budget, the higher the willingness for localized or dematerialised services. It may be interesting for NearUS to consider providing annual membership for accessing 'basic' online services.

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Furthermore, the respondents having indicated ‘0€’ as budget could be partly considered as part of this trend. Indeed, some indicated their interest in the services but inability (notably for administrative reasons) to dedicated budget for such activities. Others from the same category reported not being willing to pay nonetheless, underlying the availability of national / regional structures providing similar services.

Interviews inputs

In terms of the willingness to pay for the services suggested, the interviewees considered that it would be highly dependent on the value, and the added-value the clients would perceive for each service. The Return on Investment (ROI) was also stated by some of the interviewees as a relevant indicator to take into consideration when analysing the willingness to pay for such a service. In addition, some interviewees mentioned the possibility of having success fees on the services provided. For example, if a service identified and supported the application of potential interesting opportunities (including funding schemes), depending on the size of the contract, the NearUS Network could receive a success fee (where applicable) in case the proposal is approved. The interviewees also mentioned that a fixed fee could also be applied, in combination with the success one. This could be further applied in other types of services offered by the Network.

Conclusions: Budgetary considerations

This section of the analysis is to be considered with caution: investment intentions are complex to assess, notably with little information on NearUS services’ formats and contents. Nonetheless, following points come out of 'budgetary considerations' section:

About a half of survey respondents indicated they ‘do not know’ their investment capacities, that they would not be able to pay for the services proposed or indicated unrealistically low levels of investment for the services proposed. Due proportion being observed, these results illustrate a sort of European "timorousness" on investment that is an integral part of European culture of R&I. NearUS project intends to play a role in changing mindsets towards more audacious innovative strategies.

NearUS business plan will have to consider targets variety and subsequent willingness to pay for determining its value proposition. In line with this analysis results, online tools could be valorised through a ‘classical freemium’ scheme, that takes into consideration respondents willingness to get relevant information at low costs. These tools would also constitute a ‘loss leader’ for “face-to-face” services, that would be charged at fixed rates (at least until their ROI appear clear to their customers), which could evolve towards a ‘success-based fee’ scheme, on the long run.

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6 Conclusions and next steps

6.1 Conclusions

General conclusions

This ‘demand analysis’ achieved its prime objective: assess and quantify the demand and latent needs of NearUS stakeholders from the R&I community, quantifying their demand for support and the potential market for the planned activities. Thus, it shows that NearUS can foster the establishment of concrete links between the EU and the US innovation ecosystems through the establishment of services to be tailored to the ‘demand’.

As such, NearUS will provide much needed support to the numerous stakeholders who consider the US as a ‘go-to area’, being the largest technology market with high-level know-how that enables forging technically challenging and economically sound partnerships. Indeed, stakeholders are convinced activities in the US provide new opportunities for their organisations and companies to gain experience, new ideas, knowledge, valuable contacts and thus new ‘revenues’.

The ‘needs’ expressed by the diverse stakeholders regarding each strand & services are detailed in the respective sections of this document (chapter 4 and 5) where relevant concrete suggestions were provided for either further investigation on specific aspects for a service given or the adaption of a service to the real needs and demand observed. These are summarized below.

Main findings of the survey and interview results

Public or governmentally owned types of structures remain essential targets and facilitators of NearUS services. Private stakeholders seem relatively less interested in quantitative terms, but chances are they need to be convinced of NearUS ROI for investing in its offer. Also, the overall percentage of private stakeholders amongst the survey respondents was lower in total terms.

Eastern European countries, namely Bosnia Herzegovina, Bulgaria, Croatia, Czech Republic, Hungary, Moldova, Poland, Romania, Serbia, Slovenia seem to be highly interested in developing activities in the US; Germany and Austria are highly interested in international collaboration in general, and in collaboration with the US in particular. Other Western European countries expressed moderate interest: Portugal, Spain, Belgium, Denmark, France, UK and Ireland. Nevertheless, it should be kept in mind that this has to be considered as a trend rather than an absolute figure, as overall numbers per country are influenced by the dissemination made per country. The number of respondents for some of the countries cannot be considered statistically significant.

Also, with regards to the sustainability of the Network set up, the target groups per country should be analysed not only on the aspect of their need or interest, but also their capacity and willingness to invest into a service and thus contribute to the sustainability of the Network.

Regarding the thematic areas of interest, ‘Information and Communication Technologies’ and ‘Human health and social work activities’ (notably medical services) are the main topics of concern. ‘Energy production and distribution’ comes third, followed by ‘Manufacturing and industry’.

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About three fourths of the potential customers is not currently involved in any kind of activities with the US, but is potentially interested in the NearUS services and future activities. 44% (140/318) of the respondents asked to keep in touch and update them regarding the development of the Network.

Details by strands

Research to Research (R2R)

64% (203/318) respondents identified R2R as their strand of interest, out of which most were public research type of organisations or universities. The most demanded service (170/203) was ‘Research connection symposia’, with respondents demanding it mostly on a continuous basis. There is a very high need for ‘Working visits’ (150/203) and ‘Matchmaking events’ (149/203). The demand for ‘Analyses/studies’ is moderately high (130/203), and it is suggested that these studies should focus on ICT, Health and Energy. The demand for an ‘IPR support service’ was quite low (67/203).

Research to Market (R2M)

60% (190/318) of the respondents identified R2M as their strand of interest. The strand services were initially designed mainly for start-ups and spin-offs, however it became clear that most of such organisations considered their strand to be ‘B2B’ rather than ‘R2M’. The respondents’ profile statistics in R2M were more similar to the R2R strand: mostly public research organisations and universities. This leads to the presumption that the definition of the strand was not clear to respondents and should be reviewed.

Within this stream, unlike the other streams, Analyses/ Studies was the most demanded service (122/190), with the majority of respondents requiring this service immediately or this year. This service could tackle matters such as R&I environment, IPR matters, funding opportunities and business acceleration elements. There was a high demand for Innovation Tours (121/190) and Matchmaking events (107/190), however respondents were requesting these services mostly in 2-5 years from now. The demand for Boot camps in this stream was relatively low (86/190), and again mostly demanded in the future, rather than right-away.

Thus, it seemed like most of the survey and interview respondents in this stream are still in the initial state of accessing the market and are not quite ready to expand internationally, or at least do not seem ready to invest their time and money towards travelling to the US or participating in long events. On the contrary, they seemed to have a preference for online guidelines, perhaps because it is more easily accessible and less time and money consuming. As a result, the target group for this strand or for some services of this strand might need to be reconsidered to avoid disappointing application numbers.

Business to Business (B2B)

34% (109/318) respondents of the survey identified B2B as their strand of interest. 79% (30/38) of all SMEs and 85% (14/17) of all Start-ups that responded to the survey, chose B2B as their strand of interest. Most responses came from Austria, however Belgium, Hungary, Poland and Bulgaria seemed to be relatively more interested in the B2B strand.

The most demanded service in this stream (74/109) is ‘Matchmaking events’: respondents would like to attend such events soon and on a frequent basis. ‘’Innovation Tour’ was the second (72/109) most demanded service, however many public research organisations seemed to be interested in it, thus there is a discrepancy between the service objective and the respondents’ profile. ‘Business acceleration programme’ ranked as the third (69/109) most demanded within the B2B services. There is a high need for support for introduction to end-clients, local community and partners, however there is a very little demand for support in

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marketing collaterals. In contrast to the R2M strand, in the B2B strand the demand for Boot Camps was quite high (67/109), and the stakeholders were mostly private organisations and had a strong preference for a 1week event, however did not care about the location. There was a quite high interest in Analyses/ Studies as well (61/109), these could focus on topics of interest for businesses.

Transversal services

These services were common to all three strands, therefore their analysis was undertaken in a united manner.

There was a high demand for ‘Step-by-step navigation on the Network’s webpage: 171 respondents ticked it in at least 1 strand. Most respondents would like to use the service as soon as possible and on a continuous basis. This may be due to the budget constraint of the potential customers: it is less costly than travelling to the US, and could serve as a good introduction to collaboration with the US. There is a relatively high demand for ‘Various digital tools: 145 respondents ticked it in at least 1 strand. Most respondents would like to use the service as soon as possible/this year and on a continuous basis. The interest in the 3 subservices (First aid information kits, online education modules, webinars) is almost equivalent. However, it is worth noting that mostly public research type organisations seem to be the target customers for these services. The interest and willingness to invest into these digital services was notably lower in the B2B stream, and it seems that business type of stakeholders have a preference for services that are ‘face-to-face’ and require travelling rather than digital tools.

In all three strands, there was a moderately high interest for ‘Training events’. Most respondents would like to attend such events frequently and soon. There is a high preference for attending the events in the EU, or EU and US, but not US alone. 45% of respondents are willing to pay between 200€ and 400€ per training event.

In all three strands, there was a relatively low interest for ‘Work Space’ and ‘Media Promotion service’, which is in contradiction with the interviewees’ more positive feedback. As for the ‘Work Space’, for most respondents, it does not matter whether the service will be made available on the East or the West Coast, and 42% of them do not have any activities in the US yet. As for ‘Media promotion service’, there is a – relatively low - demand for it to be developed in the near future and on a continuous basis.

6.2 Next steps: the “Gap analysis”

The results of the early NearUS analysis efforts, the ‘offer’ mapping and the ‘demand’ mapping, will be put together and analysed in order to identify gaps and potential synergies.

This coupling will result in NearUS’ ‘gap’ analysis, namely identifying and assessing market potential of the NearUS offer, notably in view of a sustainable establishment of the Network and its services. This gap analysis will highlight opportunities for NearUS’ development – and suggest where relevant and necessary the adaptation of its operational roadmap:

The aim of this document will be to provide a complete overview of the market, and redesign the operational project roadmap, giving the solid basis for implementation of the project. Beyond the NearUS project, the resulting project roadmap will outline the basis for the services developed and deployed by the Network once set up.

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Annexes

Annex 1- Details on survey data management

Considerations on data privacy of survey respondents are of special importance for NearUS project partners. Data collected through the web survey (name, e-mail, organisation, etc.) are stored & processed by INNO, which disclosed filtered and / or aggregated contents to relevant projects' partners.

As stated in European Commission's website, "Under EU law, personal data can only be gathered legally under strict conditions, for a legitimate purpose. Furthermore, persons or organisations which collect and manage personal information must protect it from misuse and must respect certain rights of the data owners which are guaranteed by EU law[26]". As such, NearUS, CEBRABIC and ERICENA partners opted for a common policy detailed below.

- Respondent information & own management of data

EU rules regarding data privacy management were stated in the e-mail sent to potential respondents, on the introduction page of the survey and reminded to respondents on the section devoted to contact details. A clickable link to EU infographic on EU's Data Protection Directive was inserted for informing respondents on their rights & EU projects partners' obligations.

"Please note that your data privacy and the data from your network will be entirely secured. All answers will be treated in respect to confidentiality rules of the European Commission[27]. Only aggregated results of the survey will be disclosed, which cannot be traced back to individual entries."

Respondents were given the possibility to ask for opting out and / or deleting their data by requiring it by e-mail to the contact address indicated in the introduction of the survey. On a related note, potential respondents invited to answer the survey could opt out of the mailing lists used by contacting the same e-mail address.

[26] http://ec.europa.eu/justice/data-protection/index_en.htm

[27] http://ec.europa.eu/justice/newsroom/data-protection/infographic/2017/index_en.htm

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Figure 73: European Research and Innovation Centres in Brazil, China and the US - survey introduction page

- <u>Processing data in line with EU requirements about personal data privacy</u>

Portability of data: INNO communicated to each project partners (NearUS, CEBRABIC and ERICENA) data relevant for their analysis only.

Profiling of respondents: In the frame of NearUS, anonymous data from respondents are used for feeding this analysis, the offer analysis and the gap analysis. No profiling beyond statistical analysis per country, organisation type and sector of activities was made.

'Eraseability': In the frame of NearUS, anonymous data from respondents are used for feeding this analysis, the offer analysis and the gap analysis. Data out of this survey will be then erased. Respondents having filled the last – not mandatory – part of the survey for 'keeping in touch', indicated their willingness to get more info on NearUS developments and provided their contact details will be stored for next communication phase only. Should they require to be erased from NearUS contact list when receiving communication materials from NearUS, their contacts will be deleted definitively by relevant NearUS partner.

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Annex 2- Online survey dissemination

Table 14: Dissemination effort by NearUS partners

Partner	Dissemination efforts	Comment
DLR	DLR disseminated the link to the survey to its contacts via "Kooperation International" newsletter	Dissemination common to the 3 projects
EAEC	INNO sent out its Mailjet dissemination e-mail on behalf of EAEC to 808 EAEC contacts.	EAEC European contacts and EEN contacts
EBN	Communication plan set to promote and distribute the survey. • announcement of the survey published on EBN website and spread via social media. • targeted email to all EBN community members (+/- 5000 contacts). • targeted news for promoting the survey linking it with the 3 different centres.	Dissemination common to the 3 projects
InBIA	INNO sent out its Mailjet dissemination e-mail on behalf of InBIA to 1,376 InBIA contacts	InBIA European contacts
INNO	Survey campaigns • survey sent via Mailjet to 334 contacts News published • 03/04/2017: News on NearUS launch on Inno website • 07/04/2017: News on NearUS launch on ECCP website Specific dissemination through partner networks / initiatives: • Dissemination of the online survey via ECCP as a news that was sent to around 1545 newsletter subscribers (mostly clusters and experts working in R&I) • Specific communication during EU-US cluster delegation visit (May 2017) organised by ECCP and BILAT US 4.0 to around 20 EU clusters. • Dissemination to "partner projects" targeting the US and publication of news – BILAT US 4.0, PICASSO	Dissemination to various stakeholder groups from the R&I landscape in Europe; focus on clusters as intermediaries and projects / initiatives targeting EU-US collaboration
INTRA	Communication plan set to promote and distribute the survey. • E-mailing campaign sent to INTRA contacts, European projects and EEN partners • Promotion on LinkedIn towards professional networks	
NCURA	Survey sent to NCURA 199 contacts in Europe and through a twitter campaign	
RCISD	Survey sent to RCISD contacts in Hungary and in the regions to: • 45 research institute • 52 higher education • 49 Innovation and management agencies and other relevant institutions (SMEs)	Hungary centred
SPI	Survey sent to more than 2.000 contacts, reminders followed. SPI built common lists for the 3 centres and centralized the dissemination, mostly towards European-based organisations SPI launched another round of dissemination, focusing on Portuguese-based contact lists and on our partners in other ongoing/past FP7 and H2020 projects.	Dissemination common to the 3 projects

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Annex 3- Interview guidelines

NearUS interview guideline

Preliminary note to the interviewer

Frame of the interview

This interview is scheduled in the scope of the H2020 NearUS project.

The overarching aim of NearUS is to establish a sustainable Network of Centres of European R&I, with US and EU-based nodes – a "Butterfly" model, offering support in several locations in the US unlocking growth potential for EU community, and providing well designed demand driven services responding to the needs of the EU R&I community – all this to ensure an impactful wide outreach during and after the project lifetime.

The Network will further provide services, dedicated to better 'brand' the EU R&I activities and actors in the US, thus supporting the visibility of the EU R&I in the US. Organisations and projects willing to collaborate with the US will be main stakeholders.

The interviewer should collect contextual content regarding the overall position of the interviewed stakeholder, as well as insight about its practices in the field of EU-US research and innovation collaboration. The major focus of the interviews should be on needs for (support) services, gathering as much qualitative insights on the demand of the stakeholder and evaluating if the organisation could be a potential beneficiary/customer (or if its network could be so, if it is an intermediary organisation).

The focus of the interviews will be on getting key takeaways for the NearUS project partners, notably for defining the strategy of the Centre / Network as well as the services provided. The interviews are designed to provide information on the main needs and demands for the supporting services that will be offered by the Network. It is of interest to "test" if beyond the services planned in the DoA any uncovered needs exist, so the project could evaluate if other or additional services can be offered (if not during the pilot phase maybe during the sustainability phase).

In order to avoid using interviewee time gathering basic organisation information data, a preliminary form should have been completed prior to the interview (cf. Annex 1).

The questionnaire shall be filled out in this word file. It shall be filled out by the interviewer and not by the interviewee. Interviews shall be conversations (as opposed to robotic Q&A), typically over the phone, and should last approximately 30-40 minutes. It can be efficient to conduct interviews in person where convenient, such as at business events (doing several interviews in one day) or if the location is easily reachable.

The interview should run according to the following logic:

- Greeting, thanks and recap of the context;
- Content oriented discussion;
- Wrap-up and preparation of next steps (invitation to the interviewee to remain informed about NearUS)

Targets

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 733286.

Targets of the interviews are of diverse backgrounds, as such, the questionnaire should be adapted to the type of stakeholder / organisation interviewed.

Moreover, the questionnaire / interview is to be adapted depending on the target's 'level of involvement' in the US, namely if the target is:

- an EU stakeholder intending to access the US (thus NOT currently having activities in the US)
- an EU stakeholders ALREADY having activities in the US and in need of further support for its developments, notably through NearUS services

<u>FOCUS: SPI METHODOLOGY FOR SELECTING INTERVIEWEE</u>

In terms of the methodology used to select the target stakeholders according to the two groups defined above, the following should be taken into account:

Intending to access the US	*Already having activities in the US*
Internal database of partners – potential clients that Inno/SPI/RCISD know they have a potential interest in the US.	Internal database of partners – potential clients that Inno/SPI/RCISD know they have previous cooperation with the US.
Access the ECCP platform – missions to the US and assess list of clusters/companies. Partners will need to develop a short desk research to see if any information on US activity is available.	Access the ECCP platform – missions to the US and assess list of clusters/companies.
Select some survey respondents that are intending to access the US.	Check B2B matchmaking activities, such as Business Beyond Borders
Check B2B matchmaking activities, such as Business Beyond Borders	Among others
Among others	

Inno TSD proposes the following distribution of targets for a complete overview of the stakeholders to be considered for the need & gap analyses.

Domain	*Type of Organisation*	*Type of interviewee*	*Number of interviews*	*Partner in charge (TBD)*
R2R	*University*	*Researcher / research manager*	*3*	*RCISD*
R2R / R2M	*University / valorisation office*	*Research manager*	*3*	*RCISD / SPI*
R2M	*Accelerator*	*Business developer*	*2*	*RCISD / SPI*
R2M	*Start-up*	*CEO*	*3*	*RCISD / SPI*
B2B	*SME (Small)*	*CEO / CFO*	*3*	*SPI*
B2B	*SME (Medium)*	*Procurement manager*	*2*	*RCISD / SPI*
TOTAL			*16*	

Distribution of interviews

Interviews will be realised by 2 NearUS partners: SPI & RCISD.

All 3 partners involved in this task will agree on a list of potential interviewees prior to the launch of the interviews.

Distribution of interviews should also be discussed during this / these meeting(s) and any plan change agreed on by all stakeholders.

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Preparation of the Interview

In anticipation of the interview, appropriate desk research should be conducted to ensure the interview relies on an informed interviewer and that all interviews performed contribute to the development of consistent information.

The “organisation profile” (Annex 1) should be prepared in advance of the interview to identify any additional elements that may need to be addressed during the interview.

Timeline

Deadline	Action
02/06/17	Agreement on the distribution per partner / format of the interviews
02/06/17	Agreement on the content of the interview guide
02/06/17	Agreement on the list of interviewees
12/06/17	Interviews (possibly with intermediary review)
12/06/17	Completion of the interview guide with the info gathered
15/06/17	Discussion on the main info gathered
16/06/17	Integration to D1.2 – Mapping of clients and their demands

Legend

In the scope of this document, all questions to be answered are indicated in tables.

- Questions with red headers are to be answered by the interviewer;
- Questions with following background colours are to be answered by the interviewee
    - In blue, regardless of EU stakeholder ‘level of involvement’ in the US (thus to all interviewee)
    - In green, should the interviewee be an EU stakeholder intending to access the US (thus NOT currently having activities in the US)
    - In purple, should the interviewee be an EU stakeholders ALREADY having activities in the US and in need for further support for its developments, notably through NearUS services

Greeting, thanks and recap of the context *(2 min)*

Greeting, thank you, and recap on what NearUS/the interview is about and why it is valuable. Reminder that the call / meeting will last approximately 40 minutes and that no confidential data will be shared (confidential business information shall be detached from originating organization). Confirm some basic organisation and mission information.

Interview protocol

Framing NearUS awareness *(5 min)*

#1	Did you answer the common NearUS – CEBRABIC – ERICENA survey &, if yes, how would you summarise the key needs you have expressed in the survey?
Answer	

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#1-bis	*If interviewee responded to the survey, complementary question for cross-identification*: did you provide your contact details at the end of the survey?
Answer	*If NO: Go to question #2* *If YES: Go to question #4*

Framing the organisation *(5 min)*

#2 – Business Only	*What is your organisation's mission or vision statement?*
Answer	

#3	What is your organisation's offer to its target clients (e.g. types of services)??
Answer	

#4	Do you have any previous experience in cooperating with the US in market or R&I actions?
Answer	

#5	What differentiates you from other organisations in your field?
Answer	

#6	Among the following key services of the NearUS, which one(s) would you potentially be interested in?
Answer	*R2R: Key services supporting research relations between at least two research organizations* *R2M: Key services supporting relations between research organizations and companies* *B2B: Key services supporting business relations between at least two companies*

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Drivers to reach US *(25 min)*

The questions should be open enough in order to leave it to the interviewees to identify specific aspects. In order to make sure that all key drivers of research, growth and innovation are covered, the conversation should focus on specific insights, which can be categorized under the following drivers:

- Operations – business models;
- Stakeholders / customers / students;
- Supporting schemes
- Funding and finance;
- Partners and alliances;
- External risks and risk management.
- People and talent;

Bear also in mind to relate to EU challenges relevant to that trend (jobs, growth, inclusion, industrial leadership, environment, climate, etc.).

General questions on drivers to research and innovation

#7	How do you plan to develop R&I activities with the US? How much time / investment do you confer to this task
Answer	
#6-bis	How do you develop your R&I activities with the US?
Answer	

#8	What are the leading benefits you expect from engaging in R&I activities with the US, compared to other regions of the world?
Answer	
#7-bis	What are the leading benefits to engaging in R&I activities with the US, compared to other regions of the world?
Answer	

Operations – business models

#9	What is your organisation's operational model? (business model for companies, research development process for research organisations)
Answer	

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#10	What services can we create to complement your operational model and needs to go international?
Answer	

Stakeholders / customers / students

#11	Who do you target? Who are your clients/target groups?
Answer	

Supporting schemes

#12	What supporting schemes does your organisation seek for going international for market and/or R&I collaboration?
Answer	
#11-bis	What supporting schemes has your organisation pursued or utilised for going international for market and/or R&I collaboration?
Answer	

#13	What supporting schemes does your organisation seek/would seek for going international for market and/or R&I collaboration WITH THE US?
Answer	
#12-bis	What supporting schemes has your organisation pursued or utilised for going international for market and/or R&I collaboration WITH THE US?
Answer	

#14	What needs you think could be addressed by support schemes for going international?
Answer	

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#15	What do you think are the main needs for support in market and/or R&I activities targeting the US?
Answer	*This section should concentrate the discussions around NearUS services but also leave room for additional suggestions* • Innovation tours: visits of incubators, accelerators, open innovation ecosystems, university innovation centres, large US firms & governmental initiatives located across up to 3 US states • Business-to-Business Boot Camps for European businesses that are in the early growth stage and ready to participate in US accelerators • Matchmaking and Venture Capital Pitch Events for European early-growth businesses looking for partnering and investment opportunities in the US • Business Acceleration Programme • Variety of digital tools for sectoral / thematic information on EU – US business collaboration • Guidelines and information on the US innovation & business landscape, list of key-contacts, etc. facilitating collaborations with US counterparts • Online access to exclusive info for researching scientific sponsors and identifying potential partners • Media Promotion Service: Media services and coaching for the writing of press releases and articles, publications in major tech medias, blog posts management • Work space and infrastructure for public and private European organisations in the US • Training Events on “How to internationalise with the US”, providing information on markets, IP management, regulatory issues, cybersecurity, export/import control, etc.

#16	Would you be willing to pay for these services? If yes, how much would you be willing to pay for such service?
Answer	
#15-bis	Do you already have access to such services? How much do you pay for such services?
Answer	
#15-ter	Would you be willing to pay for these services? If yes, how much would you be willing to pay for such service?

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Answer	

Funding and finance

#17	What funding mechanisms do you know that support market and/or R&I collaboration with the US?
Answer	

#18	Do you consider that the funding available is enough for successfully supporting market and/or R&I cooperation with the US?
Answer	

#19	What specific areas/activities do you think funding is still lacking for supporting market and/or R&I cooperation with the US?
Answer	

Partners and alliances

#20	What partnerships and/or alliances do you think are key for successfully engaging in international market and/or R&I cooperation with the US?
Answer	
#21	What are the ones you foresee?
Answer	
#19-bis	What are the ones you made?
Answer	

External risks and risk management

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#22	When you look to go international from a market or R&I need, what do you consider to be high risks that are outside your control (external risks)?
Answer	
#23	Among the services discussed earlier, what other services could be provided to alleviate or minimize these external risks?
Answer	
#20-bis	Regarding your market or R&I needs, what do you consider to be high risks that are outside your control (external risks)?
Answer	
#21-bis	Among the services discussed earlier, what other services could be provided to alleviate or minimize these external risks?
Answer	

#24	Can you identify any regulatory, legal and administrative barriers to innovation diffusion and commercialisation in the US market, which are specific for the sector in which your organisation is operating? How do you intend to deal with these?
Answer	
#25	What services could be provided to overcome these barriers?
Answer	
#22-bis	What barriers have you experienced when approaching the US R&I and / or market in the past, such as regulatory, legal and administrative?
Answer	
#23-bis	What services could be provided to overcome these barriers?
Answer	

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People and talent

#26	Do you intend to transfer people from your team / firm to the US for your Market and/or R&I strategy?
Answer	*If yes: how many*
#23-bis	Do you / Does a part from your team / firm is based in the US?
Answer	*If yes: how many*

#27	Do you intend to hire / involve US citizens as employees / partners for your Market and/or R&I strategy?
Answer	*If yes: how many*

Key takeaways *(10 min)*

Summary of the most significant drivers and obstacles for the business innovation practice under focus within its national/regional/local institutional, socio-economic, legal, sectoral and policy context. It is important to outline the nature of the drivers and obstacles.

#28	What would you recommend to an University / start-up / SME in a similar situation to yours regarding collaboration/entry to the US? Similarly, what advice would you give to your younger-self?
Answer	

#29	How could business intermediaries (e.g. industry associations, innovation agencies) support growth and innovation in your field beyond existing / NearUS services?
Answer	

#30	What, if anything, could national or European policy-makers do to support innovative organisations in their efforts to reach the US in your sector? Is a European approach to be favoured over a national approach or vice versa?
Answer	

Wrap-up and preparation of next steps *(3 min)*

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Thank the interviewee and close with the questions below.

Bear in mind to create a business bond that could be of benefit for both interviewee and interviewer in future initiatives.

#31	Closing checklist	
Answer	Can we contact you for follow-up questions?	☐Yes ☐No
	Can we use a picture of your organisation and/or yourself (ask for it if not available), and quote the interview in the scope of NearUS?	☐Yes ☐No
	Are you interested in a training event in the scope of NearUS?	☐Yes ☐No
	Are you interested in receiving more info on NearUS and would you be interested in being put on the mailing list?	☐Yes ☐No

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