



To prepare and foster a common understanding and consensus for future actions in Europe focusing on multi-KETs pilot lines

Multi-Key Enabling Technologies PILOT LINES

Tentative policy roadmap

*Brussels,
22nd of January 2015
Maurits Butter (TNO)*





Four main barriers

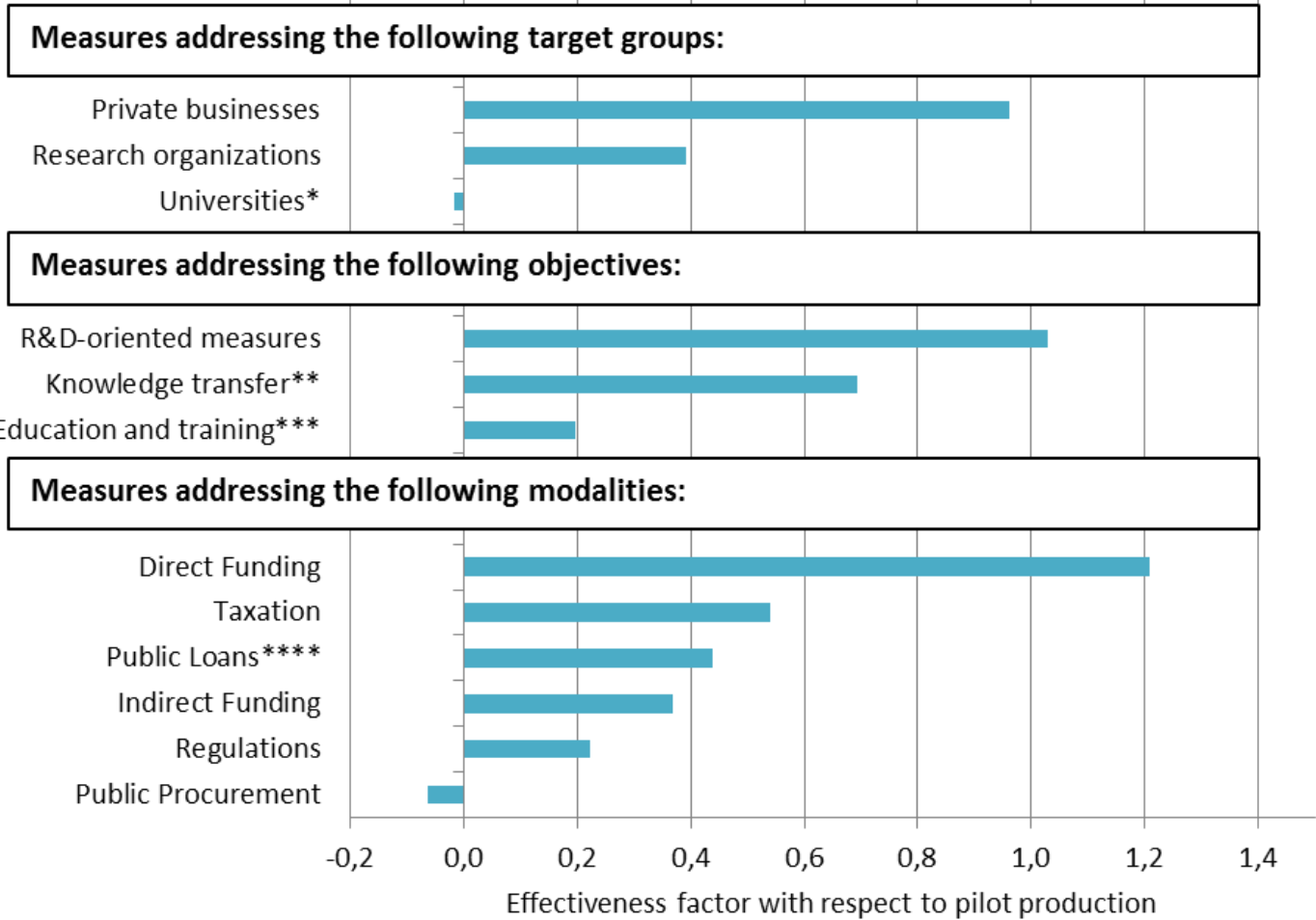
- Access to financial capital
- Limited market articulation-demand
- Quality of the innovation ecosystem
- Availability of human capital



Reasons for pilot production policy

- **Multi-KETs:**
 - *Research intensive and has strong downstream benefits*
 - *KETs are addressing societal challenges*
- **Pilot production:**
 - *Pilot production is core in an innovation ecosystem*
 - *Some pilot productions are addressing societal challenges that are not interesting to the “free market”*
 - *Some information to decide on pilot production is general*
 - *Human capital- Clear: a governmental responsibility!*
 - *Shared facilities have strong benefits to the general industry*
 - *New entrants to markets can be discouraged because of existing market structures*

The survey



Effectiveness (-2 not at all effective, 2 very effective) of support measures with respect to pilot production activities assessed by EU firms involved in pilot production. *Universities and polytechnics, **Knowledge transfer and application of knowledge in a business context, ***Education and training of Human Resources, ****Public Loans and Guarantees.

Source: mKET Pilot Lines online survey 2013, Fraunhofer ISI



Suggested policy strategies for the European Union

- **Coordination and alignment of policies**
- **Adjust policy to a faster, flexible, more agile and more aligned policy process**
- **Direct co-finance pilot production activities**
- **Develop crucial meta market-information**
- **Enhance the skills/capacities of SMEs**
- **Support brokerage, bring together industry and research**
- **Support training and education**
- **Direct contribution of politicians & policymakers**
- **Create awareness/understanding among policymakers**

Suggested policy strategies for Member States

- Align/coordinate innovation policy with EU and regions
- Adjust policy to a faster, more agile and more aligned policy process
- Support incubator programs
- Joining tripartite programs
- Develop a national action plan on pilot production
- Support technology transfer, provided by RTOs
- Provide additional national basic funding for universities and RTOs
- Support downstream SMEs activities to valorise KETs opportunities

Suggested policy strategies for regional governments

- Align policy with national and European policy interventions
- Create regional public/private investment funds
- Support of existing and creation (when necessary) of Shared facilities
- Support incubator programs





Different target groups, different policies

- **Large enterprises**
 - *Support getting access to capital, ecosystem alignment*
- **SMEs**
 - *Incubator activities, market articulation, shared facilities, brokerage, skills*
- **Universities and RTOs**
 - *Support basic funding, participation of industry*
- **Policymakers**
 - *Informing about PPA, aligning policies and their effectiveness*

Main overall conclusions

- **Scale-up Pilot production policy is an emerging trend**
- **Pilot production needs a systemic policy, with regard to product/process/organisation/market**
- **Priorities:**
 - *Market articulation*
 - *Shared facilities and*
 - *The innovation ecosystem*



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Thank you



22nd of January 2015





Parallel Sessions

- **Session 1:** Technological complexity: Technology infrastructure and institutional support (Shared facilities, RTOs)
 - *What roles do RTOs/Universities and shared facilities play in public policy for pilot production?*
 - **Room Towards Exit on the left**, Chair: Göran Gustafsson, Acreo Swedish ICT
- **Session 2:** Value network complexity: aligned development in an Eco-system (Network support)
 - *What role does eco-system/network support for pilot production play and how should it look like?*
 - **Room Downstairs**, Chair: Rob Hartman ASML
- **Session 3:** Market complexity: Pilot production for the verification of applications (Demonstrators)
 - *What role do market related policy measures play for pilot production and how should the look like?*
 - **Room HERE**, Chair: Olof Sandberg, RISE
- Coffee break at 14:10h
- Reassembly at 14:30h Room