

RESEARCH OPPORTUNITIES

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NEWS FROM THE RESEARCH MANAGEMENT PROGRAMME OF THE ASSOCIATION OF COMMONWEALTH UNIVERSITIES

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THE NEXT STEP

It is now almost two years since the ACU's Research Management programme was launched, and we are actively considering how to develop the project further. In this edition, we are seeking your help.

The issue is not one of whether the project is of interest – the hundreds of responses since we began demonstrate that it is – but rather how we can develop that interest to best effect. The aim is to develop a genuinely global network, benefiting those from developed and developing countries alike and increasing the flow of good practice in this critical area. Some of our ideas are outlined in this issue – for example a more systematic benchmarking network amongst universities, a working group to devise new training materials for the profession and



Dr Ramesh Mashelkar addresses India Day, page 13. Source: Royal Society

the staging of a genuinely global conference in the field. These are at a very formative stage, and we need to gauge your views on them. Better still, we need your additional ideas. Please find the time to complete the questionnaire included in this issue.

Some new initiatives are already under way. This edition reports on a very productive seminar for Indian universities and an exciting project to investigate the feasibility of sharing expertise in technology transfer between African universities. In both cases, external support has been obtained from government sources, and we are extremely grateful for this. We also have the usual selection of news from five continents.

From March, you will also be hearing from us more often. Thanks to a new agreement with ResearchResearch, we will be distributing a new electronic monthly briefing, summarising some of the main news items in the field. Together with our long standing relationship with COS to include funding information in the magazine, this means that we are now working alongside two leading commercial suppliers of services to universities in research management.

I hope that you will find this edition interesting – but not so much that you forget to return your questionnaires to us!

John Kirkland
Director of Human Capacity Development

Indian universities look set to form a new network to promote best practice in the field of research exploitation and intellectual property rights. This was one of the key outcomes of a high level seminar, organised by the Centre for Studies in Science Policy at Jawaharlal Nehru University, Delhi, in December. The seminar formed part of the ACU's research management programme, and was supported financially by the UK Foreign and Commonwealth Office. John Kirkland reports.

Delegates at the seminar agreed that leading universities had already begun to expand their activity in the fields of patenting and other intellectual property management. The Indian Department of Science and Technology, for example, was now assisting with the protection of almost 20 times more patents than in 1995. Likewise, although universities form only a small proportion of its activity, the National Research Development Corporation now actively manages a portfolio of over 60 new developments generated in higher education.

There was recognition, however, that this activity was building on a relatively small base, and that universities needed to be more strategic in their approach. Examples of what could be achieved came from two Indian Institutes of Technology represented at the seminar. At IIT Bombay, a new 44-page institutional policy for intellectual property management had been written, and was currently under consideration by the Senate. At IIT Delhi, a free standing, self-funding unit had been established which assisted staff in bringing new ideas to the market place. An example of this assistance was the provision of 'incubator' units on campus, through which enterprises created by staff and students enjoyed subsidised facilities in the early part of their development.

It was recognised that a strategic approach involves much wider issues than helping with exploitation and commercialisation. Critically, it needs to embrace awareness issues. Few universities include IP issues in the formal curriculum, even for science based students, although new courses at IIT Bombay and JNU were starting to address this problem. Also necessary is a clear approach to ownership and incentives. University staff have to be clear about their rights and obligations in the field, and a balance has to be struck between their needs, and those of the institution and external sponsors. Often, these needed to be recognised at the start of collaborations, rather than when a clear product has emerged.

For strategy to be effective, it is also necessary for staff to be aware of the relationship between patenting and publication. Often, the potential for conflict is over-

estimated – and can be eliminated simply by taking sensible precautions prior to making results public. Several practical ideas resulted from the seminar. One was the use of 'non-disclosure' agreements to cover discussions between staff and external parties – including, potentially, external examiners of doctoral theses. It was noted that, although precise circumstances varied between projects, the key elements in such agreements were quite uniform and that it should be possible to devise a 'standard format' that could be made widely available.



Delegates at the Delhi Seminar with UK High Commissioner, Mark Runacres (second right, front) and Professor Ashok Parthasarathi (third right, front)

Another issue was the rights of students with regard to intellectual property. Dr Philip Graham, of the UK Association for University Research and Industry Links, reported that several UK institutions have asserted rights to own such ideas, in return for revenue-sharing agreements, and that such arrangements had generally been popular. Students and visiting fellows could prove especially problematic, since they are not normally covered by standard employment contracts.

On a more positive note, institutions were encouraged to use patents more effectively in their general research activity. Although the granting of patents is no indicator of merit, or even usability, searches of material should be a pre-requisite for any new line of research. There are over 45 million patents worldwide, and an estimated 80% of the information contained has not been published elsewhere. In this context, patent literacy is an essential tool for the academic.

Exploitation of intellectual property on a global scale, properly managed, requires commitment and can be expensive. However, help is available from several sources. Representatives from the Department of Science and Technology stressed that it could assist with patent filing and maintenance in certain cases. The National Research and Development Corporation (NRDC), whose Managing Director took part in the seminar, also takes on projects on a shared cost and shared revenue basis.

NRDC has also produced materials designed to promote of Intellectual Property issues, whilst both the Department of Science and Technology and the NRDC staged promotional seminars in universities to raise awareness. Where finance is a major constraint, institutions can adopt a 'risk averse' policy of attracting patents at an early stage of the process.

Taken together, these issues add up to the need to create what many delegates termed an intellectual property culture within the institution, which combined support from the very highest level, awareness amongst the general body of staff and students and the practical structures to ensure effective implementation. In view of these requirements, it was encouraging that the 28 participants in the event included no less than five Vice-Chancellors.

The new national network, proposed in the final session, would be a means of promoting this culture generally, and specific examples of good practice in particular. In addition, it would provide a means for universities to represent their needs in the area to government, and for India to be represented in international discussions. Professor Ashok Parthasarathi, of JNU, has agreed to coordinate the initiative in its early stages by contacting institutions in the first instance. It is anticipated that membership will be on a subscription basis, whilst at least three universities have already volunteered to host follow-up events.

Finally, although the focus of the event was on specific measures that universities could adopt in the area, several speakers also placed the issues in the context of national policy more generally. In an age where globalisation is making itself felt in the specific area of intellectual property, it is essential that India is both represented and well informed in international debates. The current debate over patenting of software was one example, and a fascinating discussion took place over whether Indian interests were best expressed as a current net importer of software, or as a growing producer and exporter. In these areas, as well as the exploitation of specific technologies, a well organised group of universities can expect to have significant impact.

Further information on the seminar can be obtained from:

Professor Ashok Parthasarathi, JNU at ashokp@jnuniv.ernet.in

or John Kirkland, ACU at j.kirkland@acu.ac.uk

BENCHMARKING RESEARCH MANAGEMENT : CALL FOR EXPRESSIONS OF INTEREST

For many universities, the process of establishing research management mechanisms has developed quickly in recent years. Some now feel that there is a need to evaluate their activities in a wider context.

Responding to this need, the programme is considering the establishment, later this year, of a new International Research Management Benchmarking Club. The club would provide a forum in which universities could openly contrast their strengths and weaknesses in the field with colleagues in comparable institutions throughout the world. The main aim would be to identify strengths and weaknesses in the provision of each member, which participants could identify in practice. There would also be the possibility of producing more generic 'good practice' guides, for wider distribution.

The intention would be to use a combination of quantitative and qualitative measures, looking at the inputs and process as well as performance of the function. Every effort would be made to match institutions with broadly comparable features – in terms of size, income, research capacity and level of current research management operation, and it is likely that the project would begin with a relatively small, coherent group. Much of the work could be undertaken electronically, but some group meetings are envisaged, particularly for the more qualitative aspects.

Given current interest from governments and other agencies, it is likely that the group would be able to attract some external funding for its work. Since the most direct benefits would be to the group members, however, participating universities would be called on to meet at least some of the cost.

A full proposal for the idea is currently being developed, but it would be helpful to know of institutions with an interest in joining at this early stage, so that they can be involved in early consultations. If your institution would like to explore the concept further, without commitment, please contact:

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Costing and pricing of research activity is becoming an increasingly complex problem – particularly when the asset or expertise involved cannot easily be measured. A new initiative by European research managers is seeking to address the treatment of such ‘intangibles’. Campbell Warden reports.

European Universities are faced with the numerous challenges of a changing role. These include:

- Pressure to harmonise the different national university systems;
- Implementations of new research modes;
- The claims and aspirations of various stakeholders (including industry and society in general);
- Increased competition for, and accountability for the products of, R+D funding.

What is Intellectual Capital (IC)?

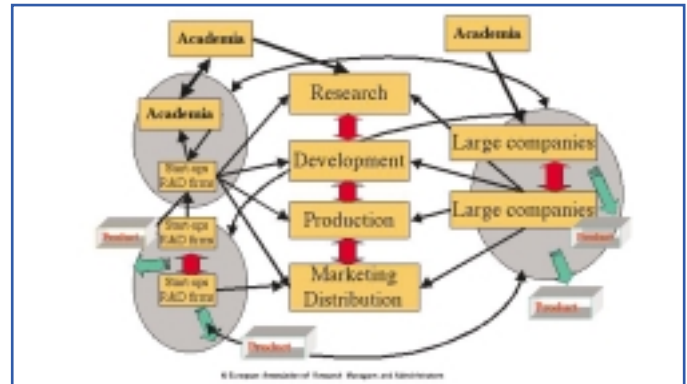
The term is used to cover all of the non-tangible, or non physical, assets and resources of an organisation, including its processes, patents and the tacit knowledge of its members and their network of collaborators and contacts (Accountants often use the expression: ‘intangible assets’ when referring to a sub-set of these). IC is often represented as consisting of ‘relational capital, human capital and structural capital’ although other sub-divisions are also used.

Why is it important that universities manage their IC effectively?

Universities are increasingly provided with greater autonomy regarding their organisation, management, and budget allocation, which requires new management and reporting systems. As organisations that are mainly funded by the public sector, they are also faced with an increased demand for transparency and accountability. Universities are knowledge producers *per se*, their most important output is knowledge, incorporated in new research results, publications, educated students and productive relationships with their stakeholders. A university’s most valuable resources are its researchers and students with their networks of relations and organisational processes. These resources are part of its Intellectual Capital (IC), even though the term is not yet in general use within the context of universities and research organisations.

In comparison with the past, universities are faced with increased complexity in the task of allocating budgets, they have to define and declare their organisational goals and strategies in a more explicit way and, due to the broader autonomy and the extended competition with other research organisations, they have the opportunity to gain a new leeway for setting strategic priorities. While in former times Universities basically undertook only scientific research and education, today their research processes are much more manifold, ranging from basic research to the development of

technologies. They educate full-time students but also offer training courses and provide laboratories for industrial applications.



Universities need to manage increasingly complex knowledge networks. Source EARMA

The need that universities face to develop managerial skills in the field of IC is complicated by the great variety of systems and cultures throughout Europe, and this has to be taken into account when dealing with the question of the management and exploitation of the knowledge production process within Universities.

Another fundamental aspect is the production by Universities of Intellectual Capital reports. The concept of IC reporting was born in the Scandinavian countries in the early 1990s. Scandia, the Swedish insurance company, published the first IC report in 1992 as a supplement to its annual report. In the following years a new movement towards the disclosure of information about the value and development of intangibles has attracted attention. In Europe and the US, companies have issued ‘accounts of intellectual capital’, which provide measurements of their success in developing and exploiting their IC. In the industrial application, approaches have been established which record ‘intangible assets’ (an accounting term often used to refer to Intellectual Capital) with the help of financial and non-financial indicators. Hereby different forms of intangible assets are differentiated and each asset is valued with the help of indicators, for instance the length of product development, customer satisfaction, etc. (see for instance Sveiby 1997 and Edvinson 1997). Besides quantitative assessments, methods such as qualitative valuations and narrations are also applied in these reports (Mouritsen et al. 1998).

The challenge and importance of IC reporting is beginning to attract the attention of Universities and research organisations (e.g. the 2001 reports by DLR and the Austrian Research Centers Seibersdorf, http://www2.dlr.de/forschung/industrie/wb/Wissensbilanz_2001_de.pdf and <http://www.arcs.ac.at/publik/fulltext/wissensbilanz> respectively) as well as their governmental funding agencies. For example, the reorganisation of Austrian universities has revealed a

high demand for the implementation of new management and reporting systems. Based on the concepts and experiences with IC reporting in general and with research organisations in particular, a concept for the application of IC reporting for Austrian universities was developed for the Austrian Ministry for Education, Science and Culture (see Leitner et al. 2001 and www.weltklasse-uni.at¹).

In the midst of widely publicised declarations by prominent figures that we are moving towards, or are already in, a knowledge-based society, it seems incongruous that there has been a greater development of the art of managing, measuring and reporting IC in 'for profit' financial and industrial organizations, than in universities themselves. The European Association of Research Managers and Administrators (EARMA²) has launched, in collaboration with ESMU³, an initiative to study possible applications of reporting and managing tools, which has been well received in many quarters. A report on the first meeting (held in October 2001) of representatives of EARMA/ESMU with a number of interested partners is available on the EARMA website: www.earma.org/WG/vimak/vimak.html. A working group on this topic has been launched: VIMaK



Session on Valuing and Managing Intellectual Capital (IC) in Higher Education and Research Organisations at the Madrid Conference, November 2002 (see references)

in HEROS (Valuing Intangibles and Managing Knowledge in Higher Education and Research Organisations) which is led by Mr Campbell Warden, of the Instituto de Astrofísica de Canarias⁴ and Dr Karl-Heinz Leitner of ARCS⁵.

There have been several recent opportunities to debate the initiative with the academic community and representatives of government ministries and other funding organisations. From these the following main points can be distilled:

- A core set of definitions of relevant indicators, which achieve general acceptance, would enable constructive benchmarking and the sharing of useful experiences;

- Each organisation may wish to develop a further set of 'context driven' indicators that will help it to improve its understanding of the key drivers and the impact of managerial decisions on these;
- Each organisation should define the objectives it wants to address by reporting the impact on its IC and its ability to generate future value by its use of these resources;
- There is little value in evaluating and reporting in themselves, if these are not accompanied by managerial action and change;
- The important thing is 'what you do with what you have' rather than just having it or assigning it a 'value'.

In view of the large number of universities, industrial RDT companies (or divisions of multinationals) and research organisations of differing characteristics that would like to participate in the development of a set (or 'sets') of 'guidelines' for the management, measurement and disclosure of Intellectual Capital, it is probable that EARMA and ESMU will take the lead in setting up two or three networks, each with between eight and ten participating organisations of a similar nature. In turn each of these organisations could serve as the regional or national 'node' for a working group or network, which would focus on the contextual issues: regional funding policy, prevailing academic structures and cultures, level of regional 'take-up' capacity for industrial or other innovations, etc. In this way the international networks could act as a 'network of networks' so as to keep the level of coordination light and manageable.

Those interested in obtaining further information, or forming part of one of the discussion and development networks should email Campbell Warden: earmaVIMaK@netscape.net with copy to Karl-Heinz Leitner: karl-heinz.leitner@arcs.ac.at

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¹ The research project was carried out by the ARC Seibersdorf research GmbH Systems Research (www.arcs.ac.at) and Montanuniversität Leoben, Institute for Economics and Business Management and funded the Austrian Ministry for Education, Science and Culture.

²European Association of Research Managers and Administrators, www.earma.org (Click on "Latest News")

³European Centre for the Strategic Management of Universities, www.esmu.be/

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The Sixth Framework Programme (FP6) is the European Union's main instrument for funding research in Europe from 2003 to 2006. The programme includes a budget increased by 17% from FP5 and focuses specifically on the creation of a European Research Area (ERA). This involves a strong focus on transnational collaboration and the increased cooperation and coordination of relevant actors at all levels with the identification of specific priority areas for a combined research effort.

Thematic priorities are:

Genomics and biotechnology for health

Information society technologies

Nanotechnologies and nanosciences, knowledge-based multifunctional materials, and new production processes and devices

Aeronautics and space

Food safety and health risks

Sustainable development and global change

Citizens and governance in the European knowledge-based society

The new programme includes a greater variety of support, including three four instruments: networks of excellence, integrated projects, specific targeted research projects and co-ordination actions. Also available is an instrument designed to improve the co-ordination of national research programmes. These new instruments will be implemented through simplified management methods and procedures aimed to promote greater efficiency, autonomy and impact. The first call for proposals was 17 December 2002.

In past programmes, institutions from certain non European countries have been able to participate through collaboration with European institutions under the International Cooperation programme (INCO). As well as continuing this funding, FP6 also makes available a further 300 million Euros to part fund the participation of non-European institutions eligible for INCO in collaborations under the wider programme. This greater openness to international collaboration is also manifested in the opening of the Marie Curie fellowship programme to citizens of non-European countries.

A major conference of over 10000 participants, including non-European institutions, was held in Brussels from 11 to 13 November 2002 to outline the objectives, priorities and rules of participation of the programme.

For more information on FP6 see the European Commission's pages:

http://europa.eu.int/comm/research/fp6/index_en.html

*How can non EU countries prepare to participate?
Diana McCann gives a view from South Africa.....*

The launch of the European Union's new research programme was considered to be a major event in South African research and technology development circles. The conference was attended by a delegation of research managers from universities, technikons, and science councils, and was headed by the Minister of Science and Technology, Dr Ngubane. The Southern African Research Management and Innovation Association (SARIMA) (www.sarima.co.za) was well represented across all sectors of the research and technology development spectrum and is now working closely with the newly established South African National Contact Point (NCP) network. The NCP network is a European Research Area wide network in which the South African NCPs are now integrated.

South Africa's agenda - poverty alleviation for the health and wellbeing of its citizens - was explicitly presented, in the framework of the New Economic Programme for African Development (NEPAD) by Minister Ngubane, who participated in several of the plenary sessions and had extensive discussions with highly placed European Commission political representatives and Directors General.

At the level of interaction with the Directorate staff who were present at special briefing sessions on each of the thematic programmes and cross-cutting programmes we were pleased to find that South Africa's position and agenda is well-known and favourably perceived. That said, we were very aware that South Africa has a limited capacity to participate in the Programme and that it will take concerted effort on the part of the NCP, researchers and research managers to optimise participation. The effort will be worth it - the calibre of research that is required and its relevance to South Africa's needs and expertise base will provide a means for South African researchers to participate in cutting edge science at the global level. Indeed, globalisation and the knowledge-networked society was a recurring theme during the conference.

This was a very well-attended conference, with nearly 10 000 delegates representing all Member States, the Accession States, and non-member States, some with special terms of relationship as is the case with South Africa and indeed all the African Caribbean Pacific (ACP) signatories of the Cotonou Convention. A feature of FP6 is its inclusiveness, so that countries such as the United States and Japan will also be participating.

The ACP States, many of which are also Commonwealth member states, are linked to the European Union by a 20-year Partnership Agreement

signed in Cotonou in June 2000, the successor agreement to the Lome Conventions, which governed ACP-EU relations for over two decades, and thus enjoy special status under FP6.

In FP6 all countries can participate, though the terms of participation differ markedly. The reason for this is that the overall purpose of the Programme is to make Europe pre-eminent in certain chosen fields. The goal of FP6 is to make the European Research Area the pre-eminent, world leaders in a few identified areas and the rest of the programme addresses issues relevant to the quality of life of its citizens. It is quite clear that the work programme looks for answers to research questions that are relevant to Europe.

ACP states may participate in all the programmes using the new defined instruments, Integrated Project and Networks of Excellence being favoured, and are eligible also to again participate in the International Science and Technology Cooperation (INCO) programme. These instruments involve establishing multi-country and multi-disciplinary teams, and in the case of South Africa, this would involve at least three European states in the main programmes, and at least three European States and three African States in the INCO programme.

The SARIMA delegation was delighted to establish contact with the European Association of Research Managers and Administrators (EARMA), and is now engaged with EARMA in instituting collaborations to benefit from the expertise, training and experience that each association has at its disposal through its membership. Currently under discussion are ways and means to benefit from EARMA's technology transfer benchmarking project and their new MBA in Research Management which is delivered through the UK Open University's distance learning methodology.

The SARIMA delegation came away from the FP6 launch conference impressed with the view that research management at the global level involves a range of high-level skills including project management, financial management, extensive knowledge of contracts and intellectual property law as well as an intimate knowledge of the research environment. Research management is undoubtedly now a desirable professional career path.

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MAKING INTERNATIONALISATION WORK

Many agencies are seeking to promote collaborative research between universities in the developed and developing world – but what incentives can be used to further this aim, and how can we ensure that participation takes place on genuinely equal terms?

These are amongst the questions currently being asked in a major consultation exercise in Canada, organised by the Ottawa based International Development Research Centre and the Association of Universities and Colleges of Canada. The work has already involved sessions on some 16 campuses throughout the country and an international session, at the Institute of Commonwealth Studies attended by Scholarship and Fellowship holders from a range of developing countries.

Chris Smart of the IDRC, speaking at the London event, explained that an already distinctive role of the Centre was its openness to external proposals, with relevance to development needs being the key criteria in assessing proposals. Whilst developing country staff need to be involved in all proposals, only 18% of projects currently funded involve Canadian collaborators - whose participation has to be justified. Despite its publicly funded status, the Centre's 21 person Board includes ten non-Canadian citizens.

Early findings from the project suggest that communication and incentives can be problematic in both developed and developing countries. Award holders at the London seminar described a lack of knowledge of funding opportunities in their home institutions, and lack of assistance in accessing them. Often this led to a reliance on internal funding sources, such as those distributed by the university research committee. Equally, sessions in Canada had suggested that collaboration with developing countries was not always attractive to faculty in career terms, particularly in the early stages of their employment.

IDRC expect to conclude the current exercise with a national seminar in Ottawa, scheduled for late May, and we hope to publish findings in a future edition. In the meantime, further information about the activities can be accessed on the web at www.idrc.ca.

The National Institutes of Health is the principal health research agency of the US Government, with an annual budget of \$24.5 billion, funding biomedical and behavioural research in universities throughout the US and overseas. Julie Stackhouse reports on funding opportunities.

For the fiscal year 2000, NIH awarded approximately \$306 million to institutions outside the US either directly or through subcontracts from US organisations. While in the past overseas institutions have been involved primarily through subcontract, an increasing number of awards are now being made directly; and it is estimated that the number of direct grants to overseas institutions will increase significantly over the next two years. The NIH comprises 27 different institutes and centres funding research and also includes a specific centre for international grants: the Fogarty International Center.

Applying for funding

Applications may be submitted to the NIH in three ways: as *unsolicited grant applications* to the Council for Scientific Review (CSR); through *Programme Announcements* in general scientific areas or through *Request for Applications* in well-defined scientific areas.

Applications are peer reviewed firstly by the Scientific Review Group, in terms of scientific merit, and then by the council of the appropriate Institute or Centre in terms of programme priorities and relevance. International applications are scored in the same way as domestic ones but, as the NIH is funded by the US government, unsolicited applications are normally subject to a further assessment as to: "Whether the project presents special opportunities for furthering research programs through the use of unusual talent, resources, populations, or environmental conditions in other countries that are not readily available in the US or that augment existing US resources. Whether the proposed project has specific relevance to the mission and objectives of the Institute/Centre and has the potential for significantly advancing the health sciences in the US."

A useful guide for applying for grants, covering criteria for overseas applicants may be found on the website of the National Institute for Allergy and Infectious Diseases, an NIH centre, which awards a large number of overseas grants (all websites given below).

The Fogarty International Center (FIC)

FIC awards specifically international grants and aims to advance health through international scientific cooperation and to build research capacity in developing countries. Research and training priorities

for 2000-2003 are: Global Health Trends: The Challenges Ahead – Changing and persistent microbial threats to health; Maternal and Child Health; The Emerging Epidemics of Chronic Disease; Biodiversity and Health; Interdisciplinary Training Needs in the New Millennium; Building US Capacity in Global Health Research; Research to Inform Health and Economic Policy; and Health and Economic Productivity: A Neglected Link.

FIC also provides a wealth of information for overseas and US institutions wishing to apply for NIH sponsored funding, available on their website and on CD-Rom. This includes information on how to apply for awards, grants policy, allowable costs, information on review procedures, the role of NIH staff and specific information such as a tutorial on the use of human subjects. The website also contains regularly updated details of requests for applications and programme announcements as well as listing FIC's activities by region.

Current programmes

Two major current programmes that focus on collaboration are: The Fogarty International Research Collaboration Award (FIRCA) and the HIV/AIDS and Related Illnesses Collaboration Award (AIDS - FIRCA). Both aim to foster international research partnerships and are open to US NIH grant holding institutions to bring in an overseas partner to benefit the research interests of both partners and to build research capacity at the overseas site. These are available for the amount of \$32,000 per year for direct costs and have regular cycles throughout the year. In addition to Requests for Applications for research projects, FIC also sponsor a number of training grants, both for US institutions offering training for overseas investigators and for training programmes at overseas institutions. FIC also has a programme that provides support for foreign researchers returning home from NIH sponsored training to help promote their productive re-entry and stimulate research in priority areas.

The Fogarty International Center

www.fic.nih.gov

NIH Programme Announcements and Requests for Application

www.nih.gov/grants/guide/index.html

How to Write a Grant Application

www.niaid.nih.gov/ncn/grants/basics

Center for Scientific Review (unsolicited applications)

Center for Scientific Review
National Institutes of Health
6701 Rockledge Drive, Room 1040
Bethesda, MD 20892-7710, USA

A new feasibility study, involving the ACU and several southern African institutions, is looking for ways for universities in the region to share technology transfer expertise to the benefit of all. John Kirkland reports.

For most universities, deciding to expand capacity for technology transfer is a relatively minor part of the problem. Balancing levels of investment and risk can be much more difficult. Effective technology transfer and intellectual property management can be expensive – with no guarantee of any financial return!

The problem is particularly acute for small institutions, or universities that, because of their subject balance or limited research base, are unlikely to develop large numbers of commercially exploitable ideas at any given time. On the one hand, there is a need to put in place arrangements that will be effective when such ideas do emerge. On the other, it would be unwise to expand provision on a permanent basis, when the amount of business generated is unlikely to merit this.

One answer, currently under explored, lies in the area of expertise sharing, through which those universities who have invested in full time expertise share this resource, as required, with others. For the larger or more established institution, the possibility of having such time ‘bought out’ could limit the risk of its current investment, and increase the flow of ideas available to it. This in turn could generate economies of scale, for example in the marketing of new products. For smaller institutions, it allows access to expertise on an ‘as needed’ basis, without an unacceptable level of risk or investment being required.

There are several ways in which such arrangements could be organised. There might be a system in which both universities take a ‘stake’ in any invention – perhaps with the larger university taking responsibility for exploitation on revenue-sharing terms. Alternatively, the smaller university could buy in to the facility on a ‘fee for service’ basis. Another possibility is that institutions might pool their expertise, and share risk through some form of regional or subject based consortium.

All of these depend on the willingness of institutions to collaborate, and the existence of a sufficient flow of new ideas. To address these key issues, the UK Department for International Development announced in November a new project to test the feasibility of such systems in the SADC region. The project will be undertaken jointly by the ACU and the Southern African Research and Innovation Management Association. The project will be directed by Rosemary Wolson, of the University of Cape Town, who has already made several visits to other institutions in the region.

The feasibility study expects to report by the end of 2003. Amongst the questions to be asked are the following:

- Which universities would be interested in supplying expertise to others, and what capabilities and spare capacity do they have?
- How many universities would be interested in using such services? How far do their areas of need overlap with available expertise?
- Ought the activities of the project to be concerned with specific ideas or inventions only, or should they be extended to wider capacity-building and awareness-raising of intellectual property issues amongst staff and students of recipient universities?
- What is the likely throughput of work from recipient universities? What in-house channels would be required to make the system work? For example, how might the interface between academic staff and external advisers be managed?
- Under what terms would the activity take place? How would the relationship between institutions be structured with regard to the cost of these activities, sources of financing and division of any revenues?
- How would the relationships be administered, and what central arrangements would be required?

The project will comprise three, overlapping, stages. These include a survey of universities, a literature survey to identify any precedents for expertise sharing in the proposed areas and trial visits to one or more institutions, to consider how the arrangements could work in practice. If successful, the work will be the forerunner of much more substantial activity.

At first sight, southern Africa seems to be the ideal location for such an experiment. Its universities contain a wide variety of expertise and capability in the field, and the establishment of SARIMA has already demonstrated their willingness to act together. The project also takes place against a background of moves by government to encourage closer cooperation, and in some cases even mergers, within the sector.

As part of this study, the ACU is looking for examples of how individual universities have shared expertise in the areas of technology transfer and intellectual property management previously – and what lessons can be learned from them. The examples need not be related to Africa, the developing world or even the Commonwealth.

Readers who know of any such examples are invited to contact Julie Stackhouse, at the ACU, with details. at j.stackhouse@acu.ac.uk. Your help will be greatly appreciated, and acknowledged in the project report.

FINDING EXTERNAL FUNDS...

Our second article looking at the findings of ACU's international survey of the practice of research management focuses on external funding for research projects, and, in particular, how research offices in different regions assist academics in finding funds, writing proposals and negotiating contracts. **Julie Stackhouse and Jay Kubler** describe results in these areas.

Background

118 HEIs from around the commonwealth responded to ACU's survey distributed in July/August 2001. The results have provided some broad detail, which has enabled us to begin analysing and comparing the types of research management structures that have evolved and the functions and processes that these undertake. Respondents were fairly evenly spread through the regions of Africa, Americas, Asia, Europe and Oceania.* In our last article we attempted to categorise respondents into the following models: Model A – 'One Stop Shop' research office, Model B – Multiple central research offices (for example a grants office and a separate industrial liaison/technology transfer office) Model C – No central research office, (where functions are carried out by senior management) and Model D – Partial research office (where some functions only, usually grant administration, are carried out by one central office.) We found that models C and D were most likely to be found in Africa and Asia, while offices in the Americas (mostly smaller institutions) tended to conform to model A. Offices in the UK (predominantly larger institutions) and Oceania were split evenly between A and B. When looking at practices of research management we found that differences often emerged in terms of both models of research office and region.

Sources of funding

Not surprisingly we found numbers of externally funded contracts varied by region and size of institution. For example, 88% of our respondents from Europe reported over 100 external research contracts per year while in Asia and Africa only about one quarter of respondents reported these numbers. We also asked respondents to give a rough estimation of how their external funding was split between various types of funder. The table below shows the regional and overall averages of these percentages. National government sources represented the largest proportion of external funding for those surveyed. This varied significantly by region, from an average of 67% in the Americas down to an average of 32% in Africa. The private sector, although a long way behind with an overall average of

15%, was the second largest source of external funding. Again this was subject to significant regional variation - from 25% in Oceania down to 6% in Asia. Africa reported the largest average percentage of external

	Africa	Asia	Americas	Europe	Oceania	Overall
International Foundations (eg Rockefeller/ Ford)	15	2	3	3	2	6
International Agencies (eg UN, World Bank, USAID)	18	8	6	11	3	10
National Foundations/ Trusts/ Charities	11	8	6	18	10	11
National Government Sources (eg Central and Local Government, Research Councils)	32	57	67	39	48	47
Private Sector	10	6	13	18	25	15

Average percentage of external funding by type of funder and region

funding coming from International foundations and agencies (15 and 17% respectively). For International agencies the UK follows with 11% (largely due European Commission funding). The UK is also the region with the greatest proportion of funding (18%) from national foundations, trusts or charities, followed by Africa with 11%.

The graph below shows interesting regional variation. Funding in the UK seems to be most widely distributed with significant amounts from international agencies, government, private sector and national charities. In Oceania, by contrast, the majority of funding comes from government or the private sector. Africa has one of the lowest proportions from government sources but a significantly larger proportion from international agencies and foundations than other regions. Asia appears to receive lower levels of funding from international sources and has a much higher dependency on national government sources with very low private sector involvement. The Americas are to some extent similar but with a greater proportion of funding from the private sector. These diverse patterns of funding suggest a greater need for research management, with numerous different places from which funding could be sought and different bodies with whom contracts may be entered into.

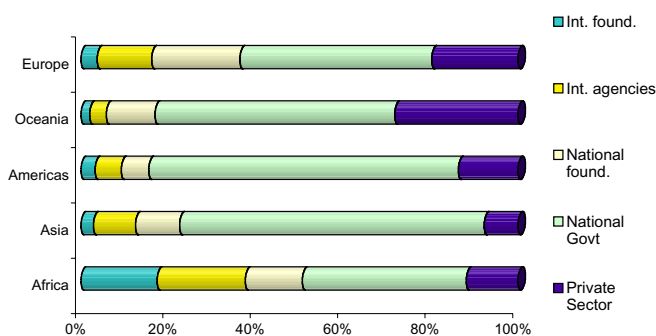
On a cautionary note, it must be remembered that the funding discussed here is in addition to 'block funding', and also that a certain percentage of one institution's external research funding may be vastly different in material terms to the same percentage of another institution's external research funding. These figures can only give a rough guide to the spread of sources where external funding is found and more detailed information on research income by source would be needed to give a more exact picture.

Finding external funding sources

As discussed in our previous article, *Market Intelligence* was an area that many respondents, particularly in Africa and Asia, felt needed improvement, as was *Knowledge of Funding Opportunities*. In these areas

*Sample characteristics: The Americas group is predominantly Canadian; the European group is exclusively made up of UK institutions

we found that smaller institutions, which did not have a large number of external contracts, and, which often did not have a research office were least confident. 69% of respondents told us their institutions had a central mechanism for identifying research opportunities. However, only 29% of institutions that we had categorised as Model C (no research office) had such a mechanism. Only 35% of respondents from Africa had a central mechanism as opposed to 95% from the UK. It seems that for most respondents, the research office provided this central mechanism. Some respondents stated that this was one of the key roles of the research office and usually gave details of the ways in which this data was gathered.



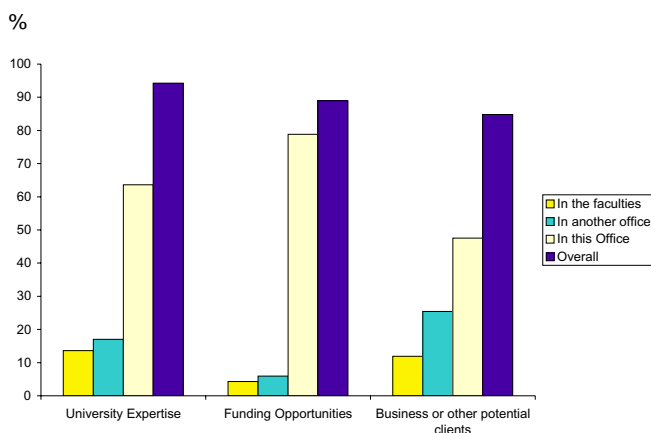
Average percentages of different sources of external research funding

Respondents were asked to rank the following mechanisms for finding out about funding opportunities in order of importance: direct mailings from funding bodies, external databases, government tender system, networking /academic peer group, and other mechanisms. Direct mailings were most often ranked as most important, mainly by African, Asian and UK respondents. External databases came next. These were rated particularly highly in the UK and fairly highly in Africa but were much lower in Asia, the Americas and Oceania. Institutions with more developed research management structures were more likely to rate these as important. Networking was usually next in importance and this was fairly even across regions. Government tender systems were not rated highly anywhere but in Oceania. A significant number of respondents mentioned other mechanisms such as general and proactive internet searching, subscription to email lists and scanning newspapers and other printed publications. A number mentioned specific external web-based databases.

Databases

Keeping central records of both funding and research expertise in the university is seen by many as a crucial aspect of research management. We asked whether respondents' institutions held central databases of university expertise, funding opportunities and business or other potential client organisations. The majority of respondents indicated they did have such

databases. We also asked whether these were located within faculties, the research office or another central office. The results are shown in the graph below. 89% of respondents had databases of funding opportunities within their institutions, and these were most likely to be found within the respondents' own office. Oceania and the Americas were most likely to have databases on funding in the research office followed by Africa and the UK. Asia was least likely overall to have databases in the institution and was more likely than the other regions to have these in the faculties. Respondents categorised as Model C (no research office) were less likely than others to have databases within their own offices. Databases of University expertise were most likely to be dispersed around the institution within the faculties. This was particularly the case in Asia where 35% of respondents reported databases in the faculties and in Africa where this was 21%.



Location of databases within the institution

Databases on business clients were more likely than other databases to be located in other offices, especially for large institutions and especially for those with a model B set up in Oceania. This is probably where the industrial liaison function is separate from the grant administration function. Respondents from the UK were mostly likely to hold databases on business clients within their own offices.

Distributing information

Email distribution lists were the most popular way of distributing funding opportunities to staff, used 'regularly' by 71% of respondents. 61% of respondents also distributed information through regular personal contact with staff. Just over half used internal newsletters and slightly less than a third regularly used seminars. Those with centralised research management structures, along with larger institutions and those from the Americas, UK and Oceania were most likely to use email lists (institutions from Asia were least likely, at 33%, to regularly use this method) and also to hold seminars to disseminate information. Institutions without a centralised research office were more likely,

in areas other than Oceania, to use internal newsletters. Smaller institutions and those in Oceania and the UK were most likely to distribute information through personal contact.

Writing the proposals

Proposal writing was an area that most respondents were involved in. Overall, 74% of our respondents said that their office offered support for proposal writing. This was highest in Europe with 88% and lowest in Africa and Asia with 65% and 50% respectively. This was significantly higher in institutions with research management offices than those without. Within Africa, for example, those institutions with research offices were more likely than those without to offer support.

86% of respondents saw more than half of all proposals before they were submitted and 57% saw nearly all. Those with office types A and B were slightly more likely (at 61% and 64%) to see all proposals. African offices were least likely to provide training across all areas. Those with model D offices (partial research office) were also less likely than A and B to provide training but had a slightly greater tendency to use external sources.

Interestingly, while African institutions seemed to offer more support and training in proposal writing than Asian ones they were less likely to have control over the process of submitting the proposals. This may be partly due to a history, in some regions, of staff dealing with clients independently. This also highlights two distinct functions of research offices: on the one hand the proactive assistance and support of researchers and on the other, the more reactive impetus to ensure the process is regulated and that the institution does not lose out.

Respondents were asked which particular aspects of proposal writing their office would most often be involved in: technical compliance, contractual and legal compliance, costing and pricing, presentation and ethics. Overall, technical compliance, which we described as meeting the requirements of sponsor/institution, was the area that most offices were involved in. 62% of respondents told us that their office was 'always' involved in this and 26% saying their office was 'sometimes' involved in this. Contractual and legal compliance was similarly an important area with 59% 'always' involved in this area and 29% 'sometimes' involved. For costing and pricing the picture was more mixed with 16% 'never' being involved in this. 21% of respondents were 'never' involved with ethics. Regional differences were again apparent: offices in Oceania were most likely to be involved with compliance and costing and pricing. Offices in the Americas were more likely than other regions to assist with ethical issues but were only

'sometimes' involved in costing and pricing. Responses from Asia were quite mixed but this was the region least likely to be involved in both Ethics and legal compliance. African offices were often involved in technical compliance and presentation but less than half were 'always' involved in costing and pricing. Responses from the UK were fairly mixed and respondents were more likely to be 'sometimes' involved in various aspects although 58% were 'always' involved in costing. Respondents with models A and B were more likely than others to be 'always' involved in both technical and legal and contractual compliance.

75% of respondents provided advice on contract negotiation although only 58% and 57% of African and Asian respondents did this. *One-stop shop* offices were most likely to provide advice. 92% of respondents said that their institution had a requirement for a central office to sign a copy of the contract and 88% had a requirement for a central office to retain a copy of the contract. Overall, only 36% of respondents had legally qualified staff. This was least likely in Africa and Asia and most likely in Oceania. 90% of respondents had access to legal expertise.

Conclusions

From the data so far it seems that as research offices are set up it is more likely that mechanisms for efficiently gathering and distributing information, along with databases of funding, clients and expertise, will be established and held centrally. Regional differences are interesting, in terms of sources funding and mechanisms used to find out about these, and suggest the varied environmental issues that might impact on research management.

Our results also suggest that where research offices are developed the institution is more likely to offer support and training for and be involved in writing proposals and negotiating contracts. Again, regional differences were interesting in terms of which aspects of proposal writing the research office is most likely to be involved in. For example, ethical issues were more likely to be dealt with by offices in the Americas whereas costing and pricing was a higher priority for offices in the UK. This variety suggests that much might be gained from sharing expertise and good practice internationally as well as reinforcing our perception of the complexity of the research process and the growing need for research management.

For further information on the survey contact
Julie Stackhouse on j.stackhouse@acu.ac.uk

India Day is organised by the Royal Society both to communicate collaborative research between India and the UK and to encourage future links. Jay Kubler was there to report.

India Day took place in December 2002. The aim of the event was to celebrate and develop closer links between the UK and India in the field of science and technology. Presentations were given by scientists from both India and the UK in the fields of genomics, biotechnology, information and communication and space research. There was also a strong emphasis on funding and collaborative opportunities with presentations from the British Council (India), EPSRC (Engineering and Physical Sciences Research Council), the Wellcome Trust and HEFCE (Higher Education Funding Council for England).



Speakers at India Day. Source: Royal Society

Each speaker reiterated the importance of collaborative research and shared resources as a crucial factor in advancing scientific innovation and enterprise. The day was introduced by the Indian High Commissioner, Mr Ronan Sen, who spoke of the historical and linguistic relationship between the UK and India as a foundation for strengthening scientific and technological links between the two countries. He also talked about the importance of fostering projects towards industrial application. This theme was picked up by the first guest speaker Dr Ramesh Mashelkar, FRS, Director General of the Council of Scientific and Industrial Research (CSIR). Dr Mashelkar talked of the significant contribution of science and technology to the socio-economic development of post-independence India. He also spoke of the recently established 'New Millennium in Technology Leadership Initiative,' which aims to make India a scientific leader, embracing industry as a partner in this process. Dr Mashelkar argued that a scientific and technological revolution is taking place in India (the grey revolution) which will turn India's economy into a knowledge-based economy. He stated that, already, seven of the top ten wealth creators in India were knowledge-based companies.

Other eminent guest speakers from the Indian scientific community included Dr Vijay Bhatkar, Chairman of the

Education To Home (ETH) Research Lab who gave a presentation on information and communication technologies in India. Like Dr Mashelkar, Dr Bhatkar emphasised the importance of science and technology in developing a knowledge-based economy in India and projected that by 2020 20% of the Indian GDP would be reliant on knowledge-based infrastructure and industry. Presentations were also given by Dr Govindran Padmanaban (Indian Institute of Science) on biotechnology in India and Professor S. K. Brahmachari (Director, Centre for Biomedical Technical Technology) on comparative and functional genomics. From the UK, Professor James Scott, Director of the Imperial College Genetics and Genomics Research Institute, spoke on cardiovascular disease in the Indian diaspora and collaborations between the UK and India in this area.

Along with the presentations on specific projects and research areas talks were also given on funding and support for collaborative research. State funding was addressed by Nigel Birch from EPSRC who talked about the role of UK Research Councils. Dr Guntanti Goding later spoke on the specific role of the Wellcome Trust in funding international collaborations. Dr Morna Nance OBE, Deputy Director of the British Council in India elaborated on the objective of the British council to support scientific collaboration between the UK and India. She outlined the specific goals of the British Council to increase understanding of the mutual scientific strengths of the two countries, promote more research partnerships, create a forum for the exchange of information and develop greater public understanding of science. She also spoke about the India-UK Science Festival which took place in January 2002, attended and strongly supported by the British Prime Minister Tony Blair. The festival consisted of 86 events in 11 Indian cities over a two-week period. The aim of the festival was to reinvigorate the scientific relationship between the UK and India. Other contributors also mentioned the success of the festival, most notably Professor David King FRS, the Chief Scientific Adviser to the British government.

Through its dense and varied programme the India Day succeeded in covering a wide range of issues relating to science in India as well as the scientific relationship between the UK and India. It was both encouraging and optimistic about the prospects for the future development of this relationship, provided the necessary support infrastructure and funding are in place to nurture it.

For more information on India day:
www.royalsoc.ac.uk

The role of the public sector in protecting intellectual property is increasing and could play an important role in future policy in the area, according to the report of the Commission on Intellectual Property rights, published in September. The Commission was established by UK Secretary of State for International Development Claire Short in 2001, with a brief to examine how national and international frameworks for intellectual property could best be designed to benefit the needs of developing countries.

The encouragement of patenting in state funded research bodies and universities is cited by the Commission as a major change in recent years. Whilst the best known examples are from the developed world – most notably the Bayh-Dole Act of 1980, which permitted universities in the United States to file patents based on federally funded research – there was evidence that the trend was extending to the developing world also. Over 13% of domestic patent applications in China during 2000 were accounted for by universities and scientific research institutes. The following year, the Council for Scientific and Industrial Research in India was the second largest Patent Cooperation Treaty (PCT) applicant from developing country institutions. Of the 30 top PCT applicants from developing countries, eight were from universities or other public sector institutes.

Citing evidence from the United States, the Commission recognise that the increase in patenting does not necessarily lead to increases in commercialisation and social benefit. Although some 3000 start up companies are estimated to have developed from universities in the 20 years since Bayh-Dole, and gross royalty income has risen to \$678 million over that period, there may have been other contributory factors. Examples include the 150% real terms increase in university research expenditure over the period and the spectacular increase in biotechnology based activity.

Two factors highlighted for consideration by universities were the need to consider the relationship between exclusive and non-exclusive licensing, and to be realistic about likely financial gains. On the former issue, it was recognised that both could be preferable in certain circumstances. Broadly speaking, exclusive licensing was thought to provide a better incentive to invest, whilst non-exclusive forms might be preferable where the university had developed ready to use technology. About 50% of licenses fell into each category in the United States during 2000.

The need for caution on intellectual property income is highlighted with reference to the University of California, one of the ‘foremost research universities in

PUBLIC RESEARCH & INTELLECTUAL PROPERTY

In recognising the role of public sector research in the field. The Commission stressed that:

- generating alternative sources of funding should not be seen as the principal goal – this should be to promote technology transfer
- care should be taken to ensure that research priorities – particularly relating to the needs to the poor – are not distorted by the search for licensing income
- patenting and licensing should only take place where it is judged necessary to encourage private sector development and the application of technologies
- careful consideration should be given to taking out ‘defensive patents’, particularly for use as a bargaining tool in cases where complementary technologies are owned in the private sector
- IP expertise should be developed in public sector institutions which traditionally had none – but without losing sight of public sector research objectives

the world’. In 1999, the University received gross income from royalties and technology transfer fees of \$74 million, against gross expenses of \$24 million from running the technology transfer office. Of the \$50 million ‘profit’, almost \$30 million was returned to inventors, and the balance used to finance university research. Whilst the figures are still significant, these are in the context of the leading research university, and will be much lower for other institutions. It is estimated that new research funding from licensing activity in US universities during 1999 amounted to \$149 million, set against total R&D expenditure in US academia a year later of some \$30 billion.

Whilst the need for care and proper planning exists, the report highlights both the potential for universities to make a real contribution in the area of patent protection, and the vigour with which some institutions (including some examples from developing countries) were already pursuing these objectives. Government incentives had a role to play in encouraging this trend, whilst ensuring that developments did not conflict with the traditional social and research objectives of institutions.

The full text of the Commission report, and the Executive Summary, can be downloaded from the CIPR website, at <http://www.iprcommission.org>. Hard copies can be obtained from the Commission on Intellectual Property Rights, c/o DFID, 1 Palace Street, London SW1E 5HE, UK.

Many universities recognise the need for a strategic approach to intellectual property management. Often, however, such rules concentrate on patents and research outcomes, whilst copyright – in relation to software and teaching materials – can be equally complex. Recent work in the United Kingdom provides practical advice on managing such issues in practice, as Philip Graham reports.

Previous work by AURIL has sought to help senior management recognise the importance of a core IP strategy, dovetailing with other institutional policies. In devising such policies, it is easy to concentrate on 'traditional' areas of IP, like patents. Whilst many of the principles and practices involved in these can read directly across to other areas, there are some significant differences.

A new report, published by HEFCE, extends the debate to intellectual property rights in e-Learning programmes. Copyright (which is the area of IP concerned with computer software programmes) is an important component to the strategic management of IP in an institution - particularly given the changing nature of learning. In a university with significant aspirations in e-Learning, copyright management needs to be at the centre of the institution's governance.

IP generated in the course of employment belongs to the employer, but academic staff have traditionally controlled their own copyright IP and any claim by the university was waived. However, HEIs are now seeking to exploit their teaching expertise and methods. These methods are commercially valuable and will hopefully generate additional income – just like royalty income from patents; therefore a distinction must be made between this type of copyright and other academic publications. Many universities have been seeking examples of good policy practice and draft model employment contracts which clearly define the IP copyright position.

The development of e-learning materials and their related IP is complex, possibly involving new text, new computer programmes, existing computer programmes which may be controlled through existing patents, illustration, moving image, sound recording, performances, input/footage from previous tutorials and lectures and seminars where students may own the IP. Yet the rules need to balance clarity and fairness with the need to encourage innovation.

Students might own their IP and, when involved in the creation of e-learning materials, could be voluntarily asked to assign their IP to the HEI in return for having the same incentives and rewards as members of staff. However, it is more likely that these types of materials

will be developed by a team. Here an all embracing composite agreement may be needed.

What happens if a member of staff who has been involved in the development of the programme wishes to move to another HEI? This should only become a real problem if the whole teaching group decides to move at one time. Again the contract of employment should allow for staff to use some elements of the materials when they leave but the test should be one of 'reasonableness'. The contract should detail arbitration procedures to cover this issue. For example, past employees could be prevented from using updates of the programme developed after they leave.

When several organisations develop a programme jointly, it is important to develop the consortium agreement at the outset. This should include ownership of all partners background IP, agreement on the ownership of IP developed during the project, ownership of materials used in developing the work, what happens if a partner leaves and distribution of the financial rewards.

Commercial partners should deal directly with the HEI, as the owner of the IP, rather than the individual, although academics are frequently the first link in any project. It is imperative that the institution gets involved at an early stage, and has all legal safeguards and agreements in place.

In short, the area is complex, important and developing rapidly. The HEFCE report, published in February 2003, is an essential good practice guide, containing several excellent model contracts. It will help the policy maker remain sane!

AURIL/UUK/Patent Office Strategy Document available on

www.patent.gov.uk/about/notices/manip/index.htm

The Association for University Research & Industry Links (AURIL) represents the interests of knowledge transfer and research administration specialists in universities throughout the UK and Ireland. Its work in this area has been conducted with the Higher Education Funding Council for England.

Philip Graham, the AURIL Executive Director, can be contacted at Queen's University Belfast – e.mail p.graham@qub.ac.uk

The inaugural and founding meeting of the International Network of Research Management Societies (INORMS) was held on the 29th October 2002, in conjunction with the SRA International 2002 Annual Meeting in Orlando, Florida. The meeting was facilitated by Lynne Chronister, Associate Vice-Chancellor for Research at the University of California, Davis and past-president SRA International. Report prepared by Julie Stackhouse (ACU), Michael Owen (SRA International), and Janet Dibb-Smith (ARMS).

The mission of the International Network of Research Management Societies is to improve communication and best practices globally for the administration and management of research. The goals of INORMS are to internationalise the 'body of knowledge' on research management, to exchange best practices, and to develop international approaches to the creation of knowledge and to the support of the research enterprise.

INORMS created a steering committee, with one representative of each association, and co-chaired by Janet Dibb-Smith (ARMS) and Michael Owen (SRA International).

The following international research administrator and manager societies were represented: The Australasian Research Management Society (ARMS), the Association of Commonwealth Universities, the Canadian Association of University Research Administrators (CAURA), The European Association of Research Managers and Administrators (EARMA), The Research Administrators Group Network (RAGNet), the Southern African Association of Research and Innovation Managers Association (SARIMA), the Society of Research Administrators International (SRA International), and the Swiss Association of Research



*INORMS delegates at the SRA International meeting.
Photo by Jeffrey M. Aitken*

Managers and Administrators (SARMA). Representatives from research institutions in Brazil and Israel were also in attendance. Other associations would be invited to affiliate with INORMS.

The INORMS meeting then focused on three central issues: Professional Development, Responsible Conduct of Research and International Benchmarking.

Professional development

Colin Cooper (University of Manchester Institute of Science and Technology) reviewed the 'body of knowledge'. In addition to identifying how research management, as a profession, has used expanded and specialised the 'body of knowledge', Colin focused on commonalities and gaps in the existing 'body of knowledge', how these gaps might be filled, and how the 'body of knowledge' might be internationalized and customised. Colin also highlighted existing education and training programmes and courses available to research managers:

- Certification of Research Administrators at all levels, providing ongoing professional development.
- RAGnet: An Introduction to Research Administration (and other training courses)
- SRA: DA 101, DA 201, DA 301
- SRA/National Council of University Research Administrators (NCURA) : Certification of Research Administrators programme
- EARMA: Graduate Studies Programme (GSP) Certificate, Diploma and Masters (under development) (and other training courses).

The areas covered by these programmes include:

- Project development and administration: encompassing collection and dissemination of information, proposal development, administration of awards, ethics and intellectual property;
- Legal requirements and sponsor interface;
- Financial management including costing tools; and
- General management.



THE ROYAL SOCIETY

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Responsible conduct of research

Elliott Kulakowski (Albert Einstein Healthcare Network) led the discussion on the responsible conduct of research, an increasingly complex area of great importance in research management. This includes such issues as human subject protection, conflict of interest, ethics and confidentiality. Participants discussed how INORMS could play a role in sharing good practice internationally in these areas.

Benchmarking

Paul Waugaman (Technology Commercialization Group LLC) assessed the issues involved in developing comparative benchmarking of institutional practices and performance on a global basis. Delegates were given an overview of the process and purposes of benchmarking performance. Mr Waugaman suggested defining various domains of activity, which would be of interest internationally, and then gathering data and comparing institutions in terms of both performance and practice measures. It was noted that ACU has undertaken a qualitative process for benchmarking that was similar to the practice measures discussed.

Outcomes

The INORMS agreed on the following 'work plan' for the next twelve months:

- The internationalization of the Body of Knowledge, by identifying commonalities, differences and gaps.
- The establishment of a central database of good practice.
- The planning of an international symposium on responsible conduct of research.
- The consideration of further international benchmarking.

NEW COLLABORATIVE AWARDS ANNOUNCED

The ACU and British Academy have announced support for international collaboration between Commonwealth universities in the field of humanities and the social sciences.

Under the scheme, awards of up to £5000 will be available for projects involving British scholars in collaboration with partners from at least one other Commonwealth country. Priority will be given to projects that consider the political, economic or cultural relations between regions of the world. It is expected that some seven or eight awards will be available.

The deadline for applications is 1 May 2003. Details have already been circulated to ACU Executive Heads.

Australasian Research Management Society (ARMS) 4th Annual Conference

The fourth national ARMS Conference was held in Melbourne last November as part of the Australian Health and Medical Research Congress. Being part of a much larger event, ARMS benefited from the diversity of over 2000 registrants, 25 professional societies, and 60 sponsors and trade participants. More than 200 delegates registered for the ARMS events and many of these sessions were attended by other Congress non-ARMS participants. As a result of this exposure and the successful and popular ARMS trade booth, many more members were recruited, bringing the total membership to well over 400. Two of the eminent speakers represented sister organisations, SRA International and EARMA, strengthening the international links between these and other professional research management societies.

The ARMS 2003 Conference is planned for Auckland, New Zealand from 13 to 15 October. The Organising Committee under the excellent guidance of Dr Greg Pringle extends an invitation to join them for what promises to be another excellent meeting. The themes to be explored include: Best Practice in Australia and New Zealand; Professional Development Opportunities; Strategic Research Management; and Administration Systems. For further information contact: gpringle@unitec.ac.nz

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ARMS officers pictured left to right: Jan Massey (current President); Sianna Panagiotopoulos (President Elect); Stella Clark (Immediate Past President); Adrian O'Brien (Treasurer); Janet Dibb-Smith (Inaugural President).

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ACU members can sign up for a free 3 week trial to the online service. For further information contact Thérèse Claffey on +44 20 7216 6513 or at tc@researchresearch.com

Ethics group calls for solidarity with developing countries (first published 5/2/03)

Research programmes being implemented in developing countries should be based on solidarity, in line with the Charter of Fundamental Rights, according to the EU's senior advisory group on ethics and science. "Research activities involving human subjects cannot exclusively be assimilated to an economic activity subject to market rules," it says. "Health should be regarded as a public good rather than a commodity." In its report on clinical trials in developing countries, the European Group on Ethics stresses that private or public investigators who do their research in developing countries have a moral duty to make a concrete contribution to overcome inequalities. Moreover, it thinks that "the fundamental ethical rules applied to clinical trials in industrialised countries are to be applicable everywhere".

The group stresses that clinical research should only be carried out in developing countries with good justification, when the research has a specific interest and complies with the health priorities of the host country and not for reasons of pure convenience. "The involvement of local scientists from the host country at the very early stage of the planning and implementation of the research activities is crucial to develop a culture of collaboration which is different from charity help," it adds. The group can be found on http://europa.eu.int/comm/european_group_ethics.

UK companies should exploit overseas research (first published 6/2/03)

UK businesses should be encouraged to look abroad for research and technology that may be of benefit to them, David Hughes, director general of the Department of Trade and Industry's innovation group told the House

of Commons science and technology committee at an evidence session held on 29 January. "The research that is around, the technology that is around, is not the sole province of what goes on in the UK," he told the committee. "I think acquiring technology from wherever it is, is something that we ought to think about seriously and finding links to make sure that is exploited." The session concentrated on innovation in UK businesses, and how it could be encouraged.

Promote research on organic farming, says European Commission (first published 6/2/03)

The need to promote research into organic farming is highlighted in a Commission consultation, published on 6 February. "Due to the relatively short history of organic farming and the current low market share for organic products, there are few market driven incentives for research and technological development," it says. "Consequently, there is a justification for government intervention, and a requirement to steer research organisations more into the area of organic farming." It goes on to say that research budgets in EU member states do not always include a specific amount reserved for organic farming, nor is its share appropriate to the development of organic farming. The consultation is open until 16 March.

Field trials of genetically modified chickpeas expected in 2004 (first published 5/2/03)

India's International Crops Research Institute for Semi-Arid Tropics in Hyderabad expects to conduct field trials of genetically modified seed of chickpea by early 2004. The institute is currently testing the transgenics in greenhouses. The Institute is also developing a project, funded under the Indo-Swiss collaboration in biotechnology, for developing transgenic chickpeas that would be tolerant to drought and low temperature stresses.

More R&D needed for low carbon technology (first published 5/2/03)

Strong research, development and demonstration programmes are required to develop low carbon technologies, according to an analysis carried out for the UK government by the Imperial College Centre for Energy Policy and Technology. It was released yesterday by environment secretary Margaret Beckett, who reiterated government backing for technological solutions to climate change.

The report wants to see RD&D programmes established to address renewable energy technologies, efficiency in energy production and use, and changing the nature of the energy system (covering hydrogen power, energy storage and decentralised forms of combined heat and power). It is less keen on the decarbonisation of fossil

fuels (with carbon sequestration) and on nuclear power (both fission and fusion), which it sees as limited in what they might achieve.

Pursuing these aims, and others in the report, requires the establishment of an international funding mechanism and institutional arrangement to foster the development of advanced renewable energy and energy efficient technologies, the report says. This should be complemented by the exchange of experience between industrialised and developing countries on ways of stimulating such innovation.

Australian government begins science stocktake (first published 4/2/03)

The Australian government will begin mapping Australian science and innovation across the public and private sectors for an initial report due in May. The project aims to give an overview of the state of Australian science, technology and innovation by charting resources, players, linkages and performance. It will not produce policy options. The study will identify key issues in Australia's science and innovation system, including strengths to be maintained and developed, and weaknesses and gaps which need addressing. The project follows on from the government's AUD\$3 billion five-year program, 'Backing Australia's Ability', and ties in with the current development of research priorities. Chief scientist Robin Batterham will chair the reference group for the exercise.

Bush wants eight fold increase in defence research spending (first published 5/2/03)

US president George W Bush is requesting over \$900 million for R&D to combat terrorism in the Department of Homeland Security, including \$803 million for the Science and Technology Directorate to "develop new partnerships with the private sector to research, develop and deploy homeland security technologies that will make America safer - an eight-fold increase over 2002," the new DHS states. "This investment will be focused on robust research, development, demonstration, testing, evaluation, and systems procurement program that ensure both evolutionary and revolutionary capabilities," says the White House Office of Science and Technology Policy. Funding for homeland security and combating terrorism continues to be a priority with an estimated \$3.2 billion in 2004. Research is focused on countering chemical, biological, radiological, nuclear, and other 'catastrophic' threats. Bush's budget request for 2004 also includes an increase for the National Institutes of Health of 2 per cent to \$27.9 billion.

Nielson upholds right to choose on biotechnology (first published 31/1/03)

The right of African countries to make their own decisions on biotechnology was upheld today by Poul Nielson, European commissioner for development. He was outlining the role that EU support for the life sciences and biotechnology could play in development, and describing on-going research initiatives. "In the southern Africa crisis, the EU position has been very clear: the decision on whether or not to accept GM food must be made locally, by local authorities who alone can fully appreciate local conditions, habits, policies, needs, ethics, etc. Models cannot be simply transferred from developed countries as blueprints. We therefore respect the Zambian decision not to accept GM maize because their impact has not been adequately assessed in the African context. Respecting this legitimate right will increase the chances of biotechnologies being more broadly accepted and play a useful role to fight hunger and poverty."

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FUNDING OPPORTUNITIES

In each edition of Research Opportunities, turn to this section to find current funding opportunities relevant to most or all Commonwealth researchers. The information is sourced from COS Funding Opportunities, a leading database of information about currently available funding, containing more than 23,000 funding programmes, representing over 400,000 individual funding opportunities worth over \$33 billion.

*Please note: If your institution does not have a subscription to this service, please follow the Source Link rather than the COS Record Link for the opportunities that interest you. For subscription information, please send an email to **Beverley Douglass**, uk@cos.com.*

Title: Travel Grants

Sponsor: Commonwealth Science Council (CSC)

Deadline: End January, March, May, July and September

Deadline Note:

Applications should be submitted to reach the CSC Secretariat in London at least eight weeks before the conference, meeting, or course date. As far as possible, successful applicants will be notified of the result within four weeks of receipt of their form.

Amount: Grants cover the actual costs of the return economy international air fare and registration up to a total of £1,000. They do not cover other costs such as local travel and accommodation. No correspondence will be entered into about the terms of the grant. In any three-year period, there is a limit of £1,000 per person. Barring exceptional circumstances, travel grants may not be used in conjunction with a CSC Fellowship award.

Eligibility: Applicants should be nationals of a CSC member country, normally qualified minimally to first-degree level or its equivalent, and be engaged in scientific research and technological development in a recognised institution. Applications from countries in arrears of contributions to the Commonwealth Science Council for more than two years may not benefit from the Council's travel grants and fellowship scheme. Priority will be given to applications from women scientists and from small developing states. Only applications approved by the CSC member or his/her pre-appointed representative will be considered for awards.

Citizenship: Commonwealth

Activity Location: Commonwealth

Requirements: PhD/MD/Other Professional

Summary: The purpose of the travel grant is to help scientists from member countries of the Commonwealth Science Council (CSC) to attend international conferences, major meetings, and short technical in-service training that relate to fields of CSC interest.

Awards will be given for activities that promote cooperation in the application of the benefits of science and technology between Commonwealth member countries. Priority will be given to activities supporting national priorities in current CSC programmes, especially those promoting the activities of the Commonwealth Knowledge Network (CKN), through exchange of know-how and expertise between Commonwealth countries.

Source link: <http://www.comsci.org/grants/g-docs010.htm>

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=23243>

Title: Research Grants

Sponsor: British Institute in Eastern Africa (BIEA)

Deadline Note: Continuous.

Enquiries about grants or other assistance in research should be addressed to the director at the Nairobi office. Applications should explain the nature and details of the proposed research and a budget, together with cv and the names of two referees able to advise on the applicant and the subject of research.

Amount Note: Support offered is normally intended to help with actual field research expenses in the region; the institute does not usually assist with transport to and from eastern Africa. Grants do not include institutional overheads or any stipendiary element for applicants. The following grants may be available: Major Research Grants, where the sum requested exceeds £1,000 sterling; and Minor Research Grants, where the sum requested does not exceed £1,000 sterling.

Eligibility: Because of its own sources of finance, preference is normally given to scholars in Commonwealth and eastern African countries.

Citizenship: Unrestricted

Activity Location: Africa Commonwealth

Requirements: PhD/MD/Other Professional

Summary: The British Institute in Eastern Africa awards grants to assist scholars undertaking original research in eastern Africa broadly defined, in any field of the humanities and social sciences with some emphasis on archaeology, African history, anthropology, and related subjects.

Subject to availability of funds, over the next two years (2001 through 2003) the Institute intends to give priority to research in relevant fields that focus on the urban history of eastern Africa. In addition, the institute will also give priority to research that focuses on areas bordering Victoria Nyanza, and especially those projects that encompass at least one of the following themes: settlement history and the use of space; environmental history and management of natural resources; and technology, style and exchange.

The institute also administers the Haycock Fund which, by the terms of a bequest from which it derives, is devoted principally to research on the ancient civilization of Meroe and related subjects in the region of the Middle Nile and north-eastern Africa south of Egypt. Applications for assistance from this fund by suitably experienced scholars are invited and considered from time to time, usually at intervals of a few years.

Source Link:

<http://www.britac.ac.uk/institutes/eafrica/support.html>

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=23216>

Title: Travelling Fellowships 2002

Sponsor: Stapledon Memorial Trust

Deadline: October 31, 2003 (anticipated)

Applications should reach the sponsor as early as possible, and not later than October 31, to cover fellowships starting in June of the following year.

Amount Note: The fellowships cover the cost of travel overseas and some internal travel for the fellows but not families. Maintenance is not normally paid since fellows are expected to be paid their full salary while overseas; exceptional circumstances may be considered. Fellows are normally appointed for a period of three to six months, but applications for shorter or longer periods will also be considered.

Eligibility: The fellowships are primarily intended for United Kingdom and Commonwealth research workers in agricultural science in the 30 to 45 age group. Consideration will be given to older candidates.

Citizenship or Residency: Commonwealth

Activity Location: Commonwealth

Requirements: PhD/MD/Other Professional

Summary: The Stapledon Memorial Trust Travelling Fellowships support research and development in the areas of grassland and grass-related animal production, including the social, economic, and environmental implications.

It is intended that fellowship recipients should have the opportunity to visit grassland research institutes or universities in one or more countries of the Commonwealth for the purpose of studying a particular problem connected with grassland. Consideration will be given to support visits relating to grassland research and development, and to visits concerning information on more practical aspects of grassland production and utilisation. Support will not be given for attendance at conferences.

Source Link:

<http://www.iger.bbsrc.ac.uk/igerweb/stapledon/stapledon/index.html>

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=22215>

Title: Corday-Morgan Memorial Fund

Sponsor: Royal Society of Chemistry (RSC)

International Committee

Deadline Note: Continuous

There are no formal closing dates for submission of applications. Applications will normally be considered within one month of receipt.

Amount Note: Funding will cover or contribute to the additional travel costs involved, together with appropriate subsistence, up to a maximum of £500.

Eligibility: Applicants must be members of an established chemical society or institute in any Commonwealth country, and must be citizens of, and domiciled in, any Commonwealth country.

Citizenship: Commonwealth

Activity Location: Commonwealth

Requirements: PhD/MD/Other Professional

Summary: The Royal Society of Chemistry Corday-Morgan Memorial Fund exists to enable members of any established chemical society or institute to visit chemical establishments in another Commonwealth country. The visits must clearly be of benefit to the country concerned and the visitor would be expected to give lectures and engage in other forms of information exchange or, for example, to explore the possibility for future collaboration in research.

The intention is to help applicants to make stop-overs in or diversions to such countries while travelling elsewhere for other purposes. Applicants must be travelling to another country (not necessarily in the Commonwealth) and would normally stop en route to visit the stop-over country, which must be in the Commonwealth. The grants will complement, where appropriate, those for visits to developing countries available from the International Committee's fund. Support will not be given for attendance at conferences.

Source Link:

<http://www.rsc.org/lap/funding/fundoverseas.htm#2>

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=42539>

Title: Rutherford Scholarships

Sponsor: Royal Society, United Kingdom Overseas Exchange Visits and Awards

Deadline Note: Varies. There is no fixed closing date for the scholarships. Awards will be advertised as vacancies occur.

Amount Note: The award is given for three years. The stipend is currently £8,200 per year, and is reviewed annually. Additional allowances will be granted for travel, research expenses, and university fees, although candidates from outside the United Kingdom are expected to apply for Overseas Research Students awards.

Eligibility: Applicants must be graduates of a Commonwealth university and under the age of 26 on October 1 in the year of appointment. The program is not normally open to graduates who have already held a senior research award.

Citizenship: Commonwealth

Activity Location: Commonwealth

Requirements: Graduate Student
PhD/MD/Other Professional

Summary: The Rutherford Scholarships are awarded for encouragement of young graduates of exceptional promise and ability. The scholarships will be awarded for research in any area of the natural sciences, but if there are candidates of similar merit, preference will be given to experimental physics.

Awards are tenable at an approved institution in a Commonwealth country other than that in which the applicant graduated.

Source Link:

http://www.royalsoc.ac.uk/funding/fell_rs.htm

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=21914>

Title: COL Knowledge Series - Invitation For Authorship, New Titles for 2002

Sponsor: Commonwealth of Learning (COL)

Deadline: June 07, 2003 (anticipated)

Amount Note: A standard honorarium is offered for all authorship contracts. The Knowledge Series produces four to six topical guides per year.

Citizenship: Commonwealth

Activity Location: Commonwealth

Requirements: PhD/MD/Other Professional

Summary: The Commonwealth of Learning (COL) is an intergovernmental organisation created by Commonwealth heads of government to encourage the development and sharing of open learning and distance education knowledge, resources, and technologies.

The COL invites submissions for authorship in the Knowledge Series, an annual sequence of single-subject, start-up guides on topics in distance education practice and delivery for practitioners.

Potential authors are asked to select no more than one topic for submission. Potential topics included in the open call for submissions, 2002, are as follows:

Developing library and information services for distance learning; Establishing copyright procedure in distance education; Institutional collaboration in distance education development and delivery; Open and distance learning policy development (with particular reference to dual-mode institutions).

The recommended length per guide is 3,000-4,000 words. COL retains copyright of the final published product; authors are credited and retain moral rights. The Knowledge Series is freely available for non-commercial use, with credit to both the author and to COL.

Source Link:

<http://www.col.org/resources/startupguides/knowledge.htm>

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=71373>

Title: Lindemann Trust Fellowships

Sponsor: English-Speaking Union (ESU), United Kingdom

Deadline: October 11, 2003 (anticipated)

Amount Note: Fellows receive \$30,000 each for a period of one year. Two fellowships are offered annually.

Eligibility: Candidacy is open to UK and Commonwealth citizens who graduated from a UK university or polytechnic before September 1, 1998. Candidacy is also open to UK and Commonwealth citizens who are pursuing postgraduate research at a UK university although not graduates of these institutions.

Citizenship: Commonwealth, United Kingdom

Activity Location: United States

Requirements: Graduate Student

PhD/MD/Other Professional

Summary: The fellowships allow for postdoctoral research to be carried out in a university in the United States. Fellowships are awarded by the English-Speaking Union out of funds provided from the Lindemann Trust Fellowship Fund.

The fellowships are offered to graduates of exceptional promise in both the pure and applied physical sciences,

who have shown capacity for achieving original research. Fields of research will include astronomy, biophysics, chemistry, engineering, geology, geophysics, mathematics, and physics.

Source Link:

<http://www.esu.org/educate/scholar.html#Lindemann>

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=33248>

Title: Travel Grants

Sponsor: British Institute of Archaeology at Ankara (BIAA)

Deadline: February 01, 2004 (anticipated)

Amount Note: Grants are up to £500 each. The trip to Turkey should take place between April 2003 and March 2004.

Citizenship: Commonwealth

Activity Location: Turkey

Requirements: Graduate or Undergraduate Student

Summary: The British Institute of Archaeology at Ankara (BIAA) exists to undertake, promote, and encourage research into the archaeology and related subjects of Turkey and surrounding regions, such as the Black Sea littoral. Whilst the emphasis is on archaeology, other disciplines such as anthropology, history, and literature are encouraged.

Travel grants are made to students of archaeology and related subjects to enable them to travel to and in Turkey. Applicants should note that travel grants are not intended to support participation in archaeological projects.

Source Link:

<http://www.biaa.ac.uk/funding.html#anchor80866>

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=51703>

Title: Research Fellowship in the Built Environment
Sponsor: Royal Commission for the Exhibition of 1851

Deadline: The 2003 competition will be announced in July 2003. A single fellowship is awarded every other year.

Amount Note: Funding is provided at £30,000 per year for each of two years.

Citizenship: Commonwealth

Activity Location: Unrestricted

Requirements: Graduate Student PhD/MD/Other Professional

Summary: The fellowship is given for two years' research in a specified study area. After the successful award of earlier fellowships for research into

'Landscape and Modernity', 'Urban Issues', and 'Human Habitation', the Royal Commission for the Exhibition of 1851 now intends to make a further, similar award. The Commissioners have selected as the area 'Transport and the Built Environment' as the subject for this year's competition. A broad, holistic approach is encouraged, and entries will accordingly be accepted not only from individuals but also from formal or informal partnerships. The funded research should culminate in either a personal mark of distinction (eg, a PhD) or a milestone or work of significance. In all cases, candidates are asked to identify a mentor who can contribute to, and make expert and objective commentary on, the candidate's work and who will ensure linkage and promulgation of the work to the appropriate peer group.


Projects that aim to inform the wider community are particularly encouraged.

Source Link:

<http://www.royalcommission1851.org.uk/built.html>

COS Record Link: <http://fundingopps.cos.com/cgi-bin/getRec?id=46985>

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Programme News

FORTHCOMING EVENTS

17 – 18 March 2003

SARIMA (Southern African Research and Innovation Management Association)

The Research and Innovation System - Implementing the Vision - SARIMA Workshop and Annual General Meeting held at Kopanong Estate, Gauteng, South Africa.

www.sarima.co.za

1-2 May 2003

RAGNET (Research Administrators Group Network)

The Management and Governance of Research, RAGNET Annual Conference will be held in Bristol, UK

www.ragnet.ac.uk

12-14 June 2003

EARMA

Professionalising Research Management: Facing Challenges of Changing Environments, EARMA Annual Conference, held in Faro - Vilamoura, Portugal

www.earma.org

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GETTING INVOLVED ...

The ACU welcomes comments and suggestions for further activities of its Research Management network – and getting involved couldn't be easier ...

NEW TRAINING INITIATIVE

A number of organisations now provide training for university research managers at various levels. There is not, however, as yet a recognised qualification that is both affordable and meets the needs of developing countries. The ACU, through its Research Management programme, propose to establish a new working group to consider this problem.

Expressions of interest in the group are welcomed, both from individuals with experience of providing training in the area, and potential recipients in developing countries themselves. Those interested should contact j.kirkland@acu.ac.uk, with a brief summary of their positions, and any experience to date.

QUALITY OF LIFE AWARDS

ACU member universities are invited to make up to two nominations in this year's Quality of Life Awards competition. The scheme provides grants of up to £5,000 for projects dealing with the creation and dissemination of knowledge to civil society. Priority is given to awards benefiting the developing world, but applications may be from any Commonwealth region. Details and application forms have already been distributed to Executive Heads of institutions, and the deadline for applications is 31 May 2003.

The editors welcome feedback and items for inclusion in future editions. Please contact:

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