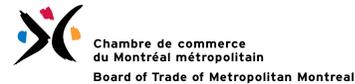


A LOOK AT CANADIAN UNIVERSITY-INDUSTRY COLLABORATION



A survey of the:



Conducted in partnership with:



This Board of Trade of Metropolitan Montreal survey was conducted in partnership with Léger Marketing, as part of:



PRESENTS

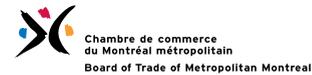
RENDEZ-VOUS DU SAVOIR



**Gather
Recognize
Influence**

**October 5 and 6, 2011
Palais des congrès de Montréal**

In association with:



Organized in partnership by:

Data compiled and tabulated by Léger Marketing.

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INTRODUCTION

MESSAGE FROM THE PRESIDENT AND CEO OF THE BOARD OF TRADE OF METROPOLITAN MONTREAL



MICHEL LEBLANC

Creators of innovations, universities are right there with us on the path to prosperity.

A GOLDMINE WITH STILL UNTAPPED POTENTIAL

The Board of Trade of Metropolitan Montreal is pleased to be involved in the organization of the second edition of Rendez-vous du Savoir, an event that highlights the central role university teaching and research play in Montréal's economic development.

Creators of innovations, universities are right there with us on the path to prosperity. While most Canadian businesses recognize the importance and quality of our institutions, only half actually collaborate with them. The situation is even more problematic in Quebec, where collaboration is largely limited to hosting university interns. Yet there is tremendous potential for R&D partnerships, a source of wealth just waiting to be tapped.

For this second edition, the Board of Trade once again asked Léger Marketing to conduct a survey, this time on the university collaboration tendencies of Canadian businesses. The goal was to gain insight into the types, outcomes and challenges of collaboration. For the first time, this year's survey compares Quebec firms to their Canadian counterparts.

In today's demographic and economic context, access to quality labour is a key competitive factor, and in this regard, our businesses are not wrong to perceive and use universities as talent incubators that produce highly qualified workers.

However, while the impending labour shortage is a critical issue, our positioning in the global marketplace also depends, and perhaps more than on anything else, on our ability to innovate. In this regard, this year's survey shows that Quebec is well behind the rest of the country in research collaboration. Although they invest as much in R&D as their Canadian counterparts, Quebec firms are far less likely to channel the money to university research centres. By not doing so, they are losing out on a vital ally.

Since the practice of university collaboration is more recent in Quebec than in the rest of the country, offering internships may well be the first step to closer ties with our institutions of higher learning. But if they hope to succeed in the knowledge economy, businesses will have to dare to step out of their comfort zone and forge lasting partnerships with academia. For their part, our universities will have to do more both in terms of making the business community aware of collaboration opportunities and better aligning research goals with business needs.

Our survey shows that "Quebec Inc." has a formidable challenge ahead. Companies that overlook the value of innovation and fail to grasp the potential of university-industry collaboration are ultimately hampering their chances of success in an open, innovation-hungry global economy.

MESSAGE FROM THE PRESIDENT OF LÉGER MARKETING



JEAN-MARC LÉGER

[...] university-industry rapprochement is a win-win strategy [...]

LEARNING FROM OTHERS

The survey conducted last year by Léger Marketing for the Rendez-vous du Savoir clearly established that business leaders think highly of our university system and believe it contributes directly to Quebec's economic development and to our city's international reputation.

Over half of the companies surveyed already collaborate with universities and 80% intend to maintain, if not strengthen, their ties with the university system. Our business leaders understand that university-industry rapprochement is a win-win strategy but do they really know all the forms this collaboration can take?

One of the best ways to understand the strengths and weaknesses of our current business model is to compare it with others. This year's survey shows that while Quebec firms continue to view universities primarily as excellent talent incubators—which they certainly are—businesses in the rest of Canada also see them as opportunities for networking through mentoring, contract research, investment projects, agreements, clinical trials and business incubator projects. In fact, the rate of collaboration is sometimes two or even three times that of Quebec.

Our collective challenge is therefore to transpose this mutual respect and shared commitment into concrete high value-added development projects like our Canadian counterparts appear to be doing more regularly than us. The goal is not to catch up but to outdo ourselves.

HIGHLIGHTS

Quebec companies that collaborate with universities do so primarily by offering internships (36%).

1- NEARLY HALF OF QUEBEC COMPANIES DO NOT SEE THE RELEVANCE OF COLLABORATING WITH UNIVERSITIES

- > The majority of the respondents (62%) believe that university-industry collaboration is relevant for their growth.
- > However, Quebec companies are more likely to consider collaboration of little or no relevance than their Canadian counterparts (49% versus 33%).
- > Just over half (52%) of those surveyed have linked up with a university in the last three years. This figure is lower in Quebec: 47% versus 54%.
- > 33% of Quebec companies that have partnered with academia in the past say that they did not encounter any challenge or barrier.

2- MOST QUEBEC COMPANIES VIEW THE UNIVERSITY SYSTEM MERELY AS A TALENT INCUBATOR

- > Quebec companies that collaborate with universities do so primarily by offering internships (36%). Collaborative research is the second most common form (13%), followed by donations to universities or their foundations (12%) and mentoring (9%).
- > In terms of the benefits of partnering with universities, 48% of Quebec companies that have linked up with a university in the past mentioned access to skills and to expertise developed in universities, while 45% cited access to highly qualified labour.

- > Only 14% of Quebec companies that have partnered with academia in the past mentioned access to innovative technology and development of a new product or service as a benefit, while 10% mentioned sharing the risk of the innovation.
- > In Quebec, 60% of the respondents invest between 0.1% and over 3% of their gross revenues in R&D. Only 29% channel some of this money to university research centres.

3- UNIVERSITIES STAND TO GAIN BY DOING A BETTER JOB PROMOTING THEIR ABILITY TO CONTRIBUTE TO BUSINESS SUCCESS

- > 28% of respondents stated that greater awareness of collaboration opportunities would make a future partnership with a university more likely or more effective.
- > At 39%, this sentiment was even stronger among respondents that had never collaborated before.
- > However, the most frequent response among those that have collaborated in the past was better alignment between university activities and business objectives (35%).

[...] the vast majority (80%) were satisfied with the experience and would like to repeat it.

4- COMPANIES MUST DARE TO DIVERSIFY AND INCREASE THEIR COLLABORATIONS

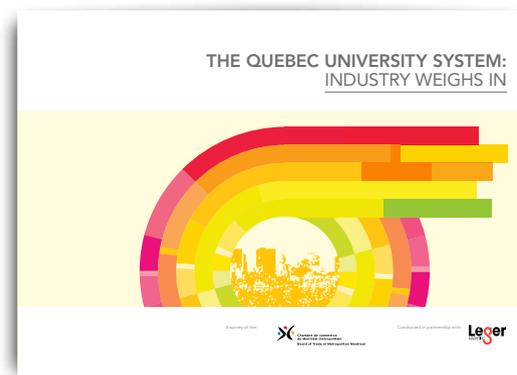
- > A third (33%) of Quebec companies and 20% of the other respondents encountered no particular problem or barrier to collaboration.
- > Those that did encounter obstacles cited the following most often:
 - Universities don't understand the realities of the business world (29%)
 - Administrative complexity and red tape (29%)
 - Insufficient in-house resources to support the collaboration (25%).
- > The obstacles become greater as the collaboration becomes closer, particularly where the legal aspects of intellectual property are concerned: 17% of the non-Quebec respondents claim to have run into difficulties in this regard, compared to just 9% of Quebec businesses.

ADDITIONAL OBSERVATIONS

- > Most of the companies have been collaborating with universities for 10 years or less. That number is even lower in Quebec.
- > Although most of those that have worked with universities experienced some problems, the vast majority (80%) were satisfied with the experience and would like to repeat it.
- > The Canadian university system is generally perceived as good, especially teaching quality. That said, Boston is considered North America's best university city (59%), followed by Toronto (39%) and Montréal (29%).
- > In order for Quebec to become a North American benchmark for university education, the respondents felt that we need more research centres (50%), more funding (48%) and better quality training (47%). Quebec companies are especially concerned about this last aspect (60%).
- > Although the business community views the university system positively, it is nevertheless quite worried about the availability of university-educated workers (59%) both for the economic development of their province and for the growth of their company (38%). Engaging in collaboration would give businesses the opportunity to explain to universities the type of education they are looking for in future workers.

[...] to be able to make comparisons and to find out whether Quebec businesses collaborate differently than their Canadian counterparts.

UNIVERSITY-INDUSTRY COLLABORATION



In October 2010, the Board of Trade of Metropolitan Montreal unveiled the results of a survey called *The Quebec University System: Industry Weighs In*, conducted in partnership with Léger Marketing. The purpose of the survey was to find out how Quebec businesses perceive our university system. While the results revealed a positive perception of university-industry collaboration, it also showed that work remains to be done to improve the synergy and increase cooperation between the two.

The main observations brought to light by this survey provided a solid foundation for the ensuing discussions between universities and businesses at last year's Rendez-vous du Savoir.

For this second edition, we wanted to broaden the reflection in two ways:

- > By expanding the scope of this year's survey to all of Canada so as to be able to make comparisons and to find out whether Quebec businesses collaborate differently than their Canadian counterparts;
- > By delving deeper into certain themes we consider important, for example, how businesses innovate, a topic that raised as many new questions as it answered in last year's survey.

With this in mind, the Board of Trade of Metropolitan Montreal commissioned Léger Marketing to survey business leaders in order to gain insight into their tendency to collaborate with universities and to gauge their perception of the Canadian university system. The main objectives of the survey were to determine:

- > The type of existing or planned university-industry collaboration and the perception of such collaboration, more specifically:
 - The perceived relevance of university-industry cooperation;
 - R&D investments and how much is allocated to university research centres;
 - The type(s) of university-industry collaboration(s) currently underway;
 - The intention to team up with a university in the future;
 - Challenges encountered on the way to collaboration and barriers that prevented the endeavour;
 - The main incentives to collaborate and elements that could make a future partnership with a university more likely or more effective;

By delving deeper into certain themes we consider important, for example, how businesses innovate [...]

Notes:
Discrepancies in or between totals in the graphs and tables (which are based on actual figures before rounding) are due to rounding. Results with statistically significant differences are indicated after the general results.

Numbers in red indicate a significantly lower proportion than that of the other respondents. **Numbers in green** indicate a significantly higher proportion than that of the other respondents.

When statistically significant differences are noted, we are referring to the survey conducted in 2010.

- The outcomes of collaborative projects (level of satisfaction and gains);
 - Profile of businesses that engage in collaboration (partnership leads and how many years the project has been underway).
- > The business community's perception of the Quebec and Canadian university systems, i.e.:
- Their quality;
 - Perception of North America's top university cities;
 - Improvements needed to the systems;
 - Concerns about the availability of university-educated workers.

METHODOLOGY

An online survey was conducted from August 8 to 20, 2011 of a representative sample of 402 Canadian business leaders. The respondents had 10 or more employees and sales of \$1 million or more. Half the interviews were conducted with Quebec companies and the remainder with companies elsewhere in Canada. Most of the results are presented as a comparison between the two. Using data from infoCanada, the results were weighted by province to ensure the sample is representative of all the companies surveyed.

ANALYSIS OF SURVEY RESULTS

COLLABORATION VIEWED AS RELEVANT... BY COMPANIES THAT ALREADY ENGAGE IN IT

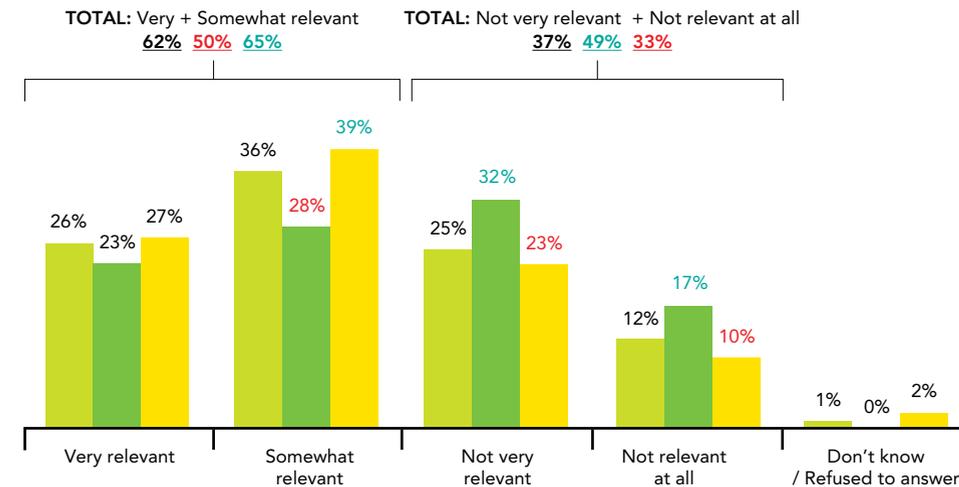
[...] there was a considerable difference between Quebec companies and their Canadian counterparts [...]

OBSERVATION 1 — NEARLY HALF OF QUEBEC COMPANIES DO NOT SEE THE RELEVANCE OF COLLABORATING WITH UNIVERSITIES

Most of the respondents (62%) consider university-industry collaboration relevant for their growth. Businesses that have linked up with a university in the last three years are even more convinced, with 85% seeing the merit of cooperation. Large companies make up a large proportion of this percentage: 80% of those with 500 or more employees perceived collaboration as relevant along with 78% of companies with sales of \$50 million or more.

In terms of the extent of the relevance, there was a considerable difference between Quebec companies and their Canadian counterparts: 49% of the former considered university-industry collaboration relevant or not at all relevant, while only 33% of the latter felt the same way.

Do you believe that university-industry collaboration is very relevant, somewhat relevant, not very relevant, or not at all relevant to your company's development?



UNIVERSITY-INDUSTRY COLLABORATION: TRYING IS BELIEVING!

[...] 80% of those that have collaborated in the past plan to do so again in the future.

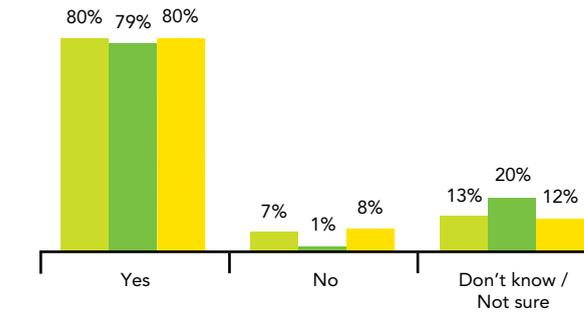
Businesses appear to see the benefits of cooperation since 80% of those that have collaborated in the past plan to do so again in the future.

Large companies with 500 or more employees (90%), companies with sales of \$50 million or more (90%), those that have been in business for 50 or more years (89%) and those that have been collaborating for more than 20 years (97%) are much more inclined to repeat the experience.

Do you plan to continue collaborating with universities in the future?

Base: Companies that have collaborated with a university in the last three years

■ Total (n=188)
■ Quebec (n=101)
■ Rest of Canada (n=87)



[...] businesses that have no plans to partner with academia will be missing out.

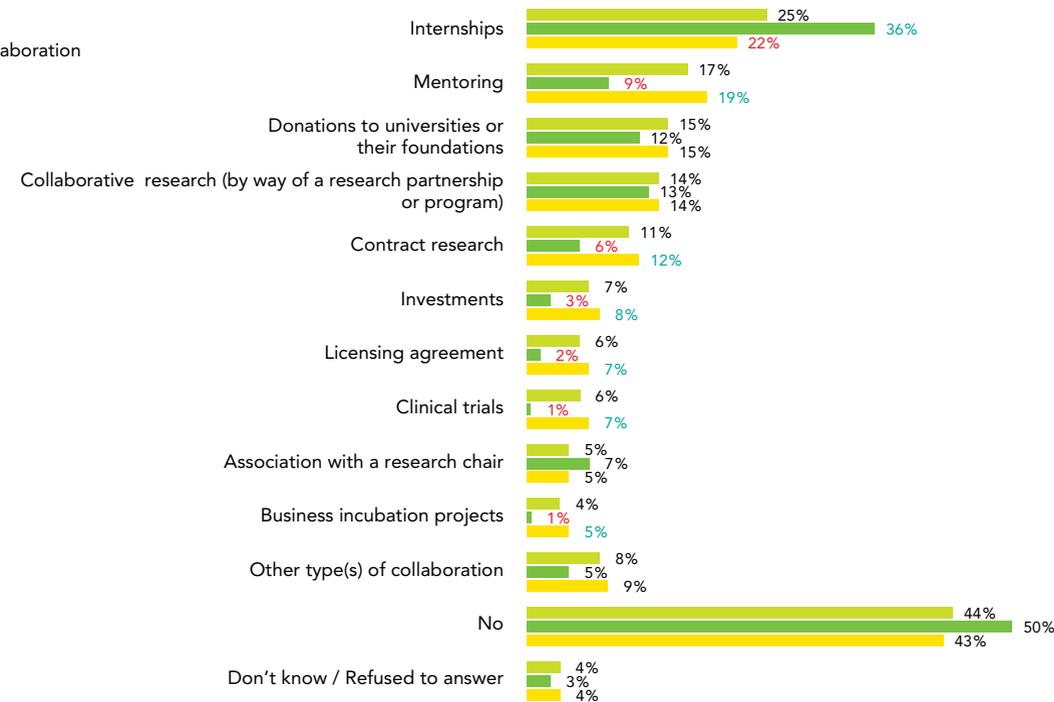
Judging by the responses of the companies that have engaged in collaboration, businesses that have no plans to partner with academia will be missing out.

That said, many of the survey respondents (52%) have in fact linked up with a university in the last three years, mainly in the form of:

- > Internships
- > Mentoring
- > Donations to universities or their foundations
- > Collaborative research

In the last three years, has your company collaborated with a university in ways other than hiring students or graduates? If so, what kind of collaboration was involved? More than one answer possible.

TOTAL:
At least one type of collaboration
52% 47% 54%



Base: All respondents

- Total (n=402)
- Quebec (n=202)
- Rest of Canada (n=200)

* Since respondents could choose more than one answer, the total mentions may be greater than 100%

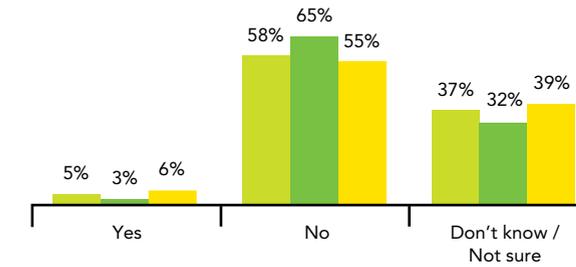
[...] only 5% are planning an eventual collaboration.

Of the companies that have not teamed up with a university in the last three years, more than half (58%) do not foresee doing so in the future, 37% don't know or are unsure, and only 5% are planning an eventual collaboration.

Are you planning to collaborate with a university in the future?

Base: Companies that have not collaborated with a university in the last three years

- Total (n=188)
- Quebec (n=101)
- Rest of Canada (n=87)



Nearly one out of two Quebec companies sees little or no merit in collaborating with universities. What's more, most of the companies (80%) that have teamed up with a university in the past claimed to be satisfied overall and plan to do so again. Quebec companies must therefore realize that innovation is the key to survival and that a partnership with a research centre is very often the path to innovation. As the results show, companies that have engaged in collaboration in the past tend to repeat the experience; in other words, trying is believing.

LABOUR AVAILABILITY COMES FIRST...

Most Quebec companies view the university system merely as a talent incubator.

OBSERVATION 2 — MOST QUEBEC COMPANIES VIEW THE UNIVERSITY SYSTEM MERELY AS A TALENT INCUBATOR

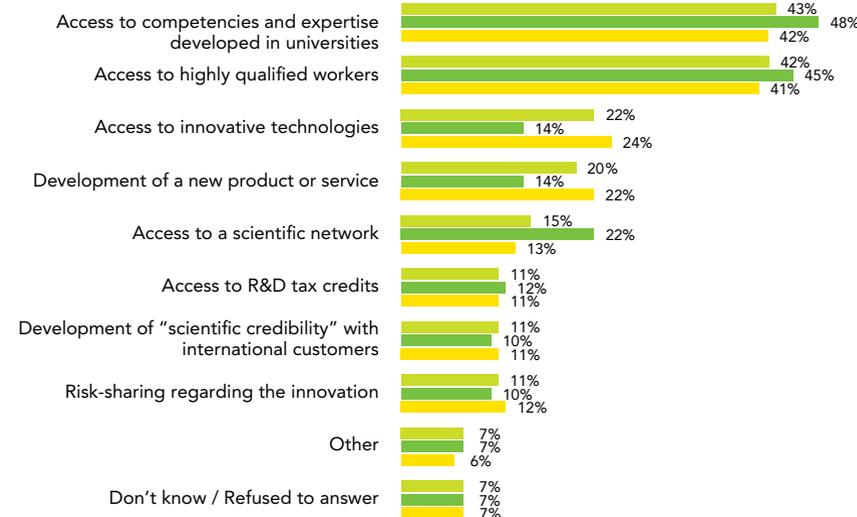
Quebec companies engage in university collaboration mainly through internships (36%), collaborative research (13%), donations to universities or their foundations (12%) and mentoring (9%). In contrast to their Canadian counterparts, they are less likely to see how partnering with academia can help them with innovation. Universities tend to be perceived more as talent incubators.

In fact, a large number of respondents that have collaborated with universities in the past mentioned access to skills and expertise developed in universities (43%) and access to labour (42%) as benefits of such an endeavour. In Quebec, the percentages were even higher:

- > 48% cited access to skills and expertise developed in universities;
- > 45% also cited access to highly qualified labour.

While a significant proportion of the companies in the rest of Canada mentioned access to innovative technology (24%), development of a new product or service (22%) and sharing the risk of the innovation (12%), these advantages were cited less often by Quebec firms (respectively 14%, 14% and 10%).

What benefits did you derive from your university collaboration? Up to three answers possible*



Base: Companies that have collaborated with a university in the last three years

- Total (n=202)
- Quebec (n=94)
- Rest of Canada (n=106)

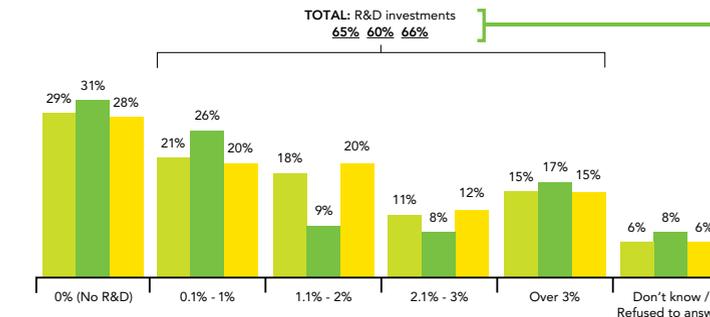
* Since the respondents could choose up to three answers, the vertical total may be greater than 100%.

... AND INNOVATION SECOND

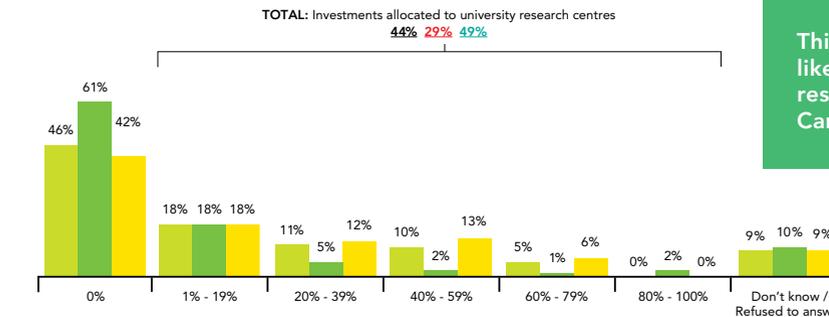
Quebec companies must therefore realize that innovation is the key to survival and that a partnership with a research centre is very often the path to innovation.

More than two thirds or 65% of the companies surveyed allocate a part of their gross revenues to research and development. Of these, 44% channel some of that money to university research centres.

What percentage of your company's gross revenues is allocated to R&D?



What proportion of your R&D spending is allocated to university research centres?



Companies that have collaborated with universities in the last three years (68%) and Canadian companies outside Quebec (49%) were much more likely to channel some of their investments to research centres.

In Quebec, 60% of the respondents allocate between 0.1% and over 3% of their gross revenues to R&D. However, only 29% channel some of these funds to research centres. Quebec businesses therefore invest almost as much as their Canadian counterparts in R&D but are far less likely to allocate the money to university research centres.

Quebec companies that collaborate with universities do so mostly by offering internships, entering into partnerships, taking part in research programs, donating to universities and mentoring students. Unlike their Canadian counterparts, they tend to see universities more as talent incubators than potential innovation partners.

This may explain why Quebec companies are far less likely to channel their R&D investments to university research centres despite spending almost as much as their Canadian counterparts in this regard.

MORE INFORMATION = MORE COLLABORATION

OBSERVATION 3 — UNIVERSITIES STAND TO GAIN BY DOING A BETTER JOB PROMOTING THEIR ABILITY TO CONTRIBUTE TO BUSINESS SUCCESS

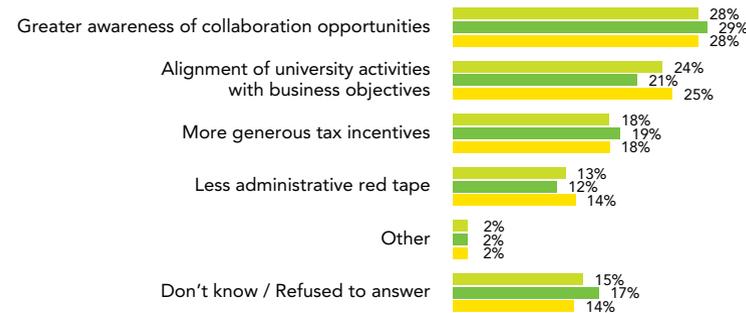
According to the respondents, there are a few things that could make a future university partnership more likely or more effective, namely, greater awareness of collaboration opportunities (28%) and better alignment between university activities and business objectives (24%).

What would make a future collaboration between your company and a university more likely or more effective?
Only one answer possible.

Comparison Quebec/Canada

Base: All respondents

- Total (n=402)
- Quebec (n=202)
- Rest of Canada (n=200)



Universities need to do a better job getting the word out about collaboration opportunities and their ability to help companies get ahead.

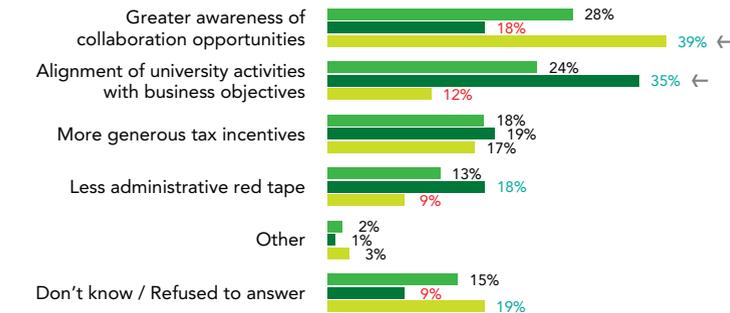
Base: All respondents

- Total (n=402)
- Has collaborated before (n=200)
- Has not collaborated (n=188)

The 39% of respondents that have not teamed up with a university in the last three years stated that greater awareness of collaboration opportunities would be helpful. Those that have worked with a university in the last three years felt that better alignment between university activities and business objectives would make a future collaboration more likely or more effective (35%) while 18% cited less administrative red tape as the strongest incentive.

What would make a future collaboration between your company and a university more likely or more effective?
Only one answer possible

Comparison have collaborated/have not collaborated



Both Quebec companies and their Canadian counterparts agree that greater awareness of university collaboration opportunities could make a future partnership more likely or more effective. Another important point mentioned is better alignment of university activities with business objectives. Universities therefore need to do a better job getting the word out about collaboration opportunities and their ability to help companies get ahead.

NO INNOVATION WITHOUT RISK

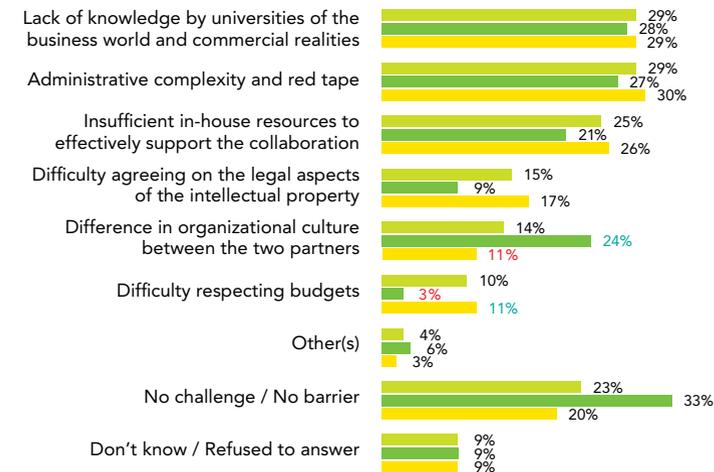
OBSERVATION 4 — COMPANIES MUST TRY TO DIVERSIFY AND INCREASE THEIR COLLABORATIONS

A third of the Quebec respondents claim to have encountered no particular problem or barrier during their university collaborations, versus 20% of their Canadian counterparts. The answers from the Quebec respondents are probably based on the fact that in most cases traditional collaborations such as internships and mentoring were involved.

The respondents cited the following as the most frequently encountered problems:

- > Universities don't understand the realities of the business world (29%).
- > Administrative complexity and red tape (29%).
- > Insufficient personnel in-house to effectively support the collaboration (25%).

What challenges, if any, did you encounter during your university collaboration or what obstacles prevented a collaboration? More than one answer possible.*



Base: Companies that have collaborated with a university in the last three years

- Total (n=202)
- Quebec (n=94)
- Rest of Canada (n=106)

* Since respondents could choose more than one answer, the total mentions may add up to more than 100%.

Quebec companies should find inspiration in the experiences of their Canadian counterparts to develop diversified, effective and enriching partnerships.

The gap widens when more specific obstacles are encountered, usually when the university-industry collaboration involves innovation, which is decidedly riskier than more traditional forms of collaboration:

- > 17% of the respondents outside Quebec claimed to have had trouble arriving at an understanding on the legal terms of the intellectual property, versus only 9% of Quebec companies.
- > 11% of the respondents outside Quebec had trouble respecting budgets, compared to just 3% of Quebec companies.
- > Conversely, 24% of Quebec companies found differences in the organizational culture between their partners and themselves, compared to 11% of their Canadian counterparts.

Although Quebec companies do not engage in collaboration as often, those that do report fewer obstacles than their Canadian counterparts, whose collaborations are more diverse.

It is reasonable to assume that collaborative research can present more challenges than a university-industry relationship that revolves only around internships.

Quebec companies should find inspiration in the experiences of their Canadian counterparts to develop diversified, effective and enriching partnerships.

RENDEZ-VOUS DU SAVOIR 2011:
A SECOND EDITION TO ENCOURAGE
MORE COLLABORATION

[...] we hope to encourage and see new ties forged between the business and academic communities, thus creating tangible spinoffs for all of society.

MESSAGE FROM THE PARTNERS OF RENDEZ-VOUS DU SAVOIR

Following the success of the first Rendez-vous du Savoir, which attracted over 2,500 people in last October, the partners are proud to present the second edition of this event, which continues to celebrate talent and innovation, making it one of the fall season's must-attend functions.

This second edition will once again serve to recognize the wealth Quebec universities generate and showcase their important contribution to society at the regional, provincial and international levels.

This year, the event will bring together the key players behind Quebec's intellectual, economic and social development, and will focus on activities aimed primarily at further strengthening the ties between the academic and business communities.

On the agenda for the two days are a cocktail-conference hosted by the Montréal Council on Foreign Relations, themed How companies and universities can better cooperate to attract talent, immediately followed by a fun and informative welcome party organized by CRÉ de Montréal and the Ville de Montréal for international students, which number some 2,000 this year.

On day 2, the Conférence des recteurs et des principaux des universités du Québec (CREPUQ) and Montréal International will hold a series of presentations under the theme *University contributions to business development – success stories*. This will be followed by a business luncheon by the Board of Trade of Metropolitan Montreal, where the guest speaker will be Quebec

Chief Scientist Rémi Quirion, who will talk about his mandate, the excellence of the next generation and the importance of public-private partnerships. Next is an awards ceremony in which Desjardins Group will hand out approximately 20 scholarships.

The 2011 edition will conclude with the Recognition Award Gala at Palais des congrès de Montréal to pay tribute to the convention centre's Ambassadors and to the researchers who won the *Ça mérite d'être reconnu!* contest, as well as to showcase a special Quebec university-industry collaboration model.

The 2010 Rendez-vous du Savoir laid the foundation for increasing cooperation between industry, academia and public decision makers. This year, through our activities, we hope to encourage and see new ties forged between the business and academic communities, thus creating tangible spinoffs for all of society.

—
The Rendez-vous partners



MESSAGE FROM THE SPOKEPERSONS OF RENDEZ-VOUS DU SAVOIR



MONIQUE F. LEROUX

Desjardins Group is the presenter sponsor of the Rendez-vous du Savoir.

To ensure our society continues to prosper, we must leverage our strengths: education, innovation and entrepreneurship. The way to do this is to pool the resources of our universities, businesses and regions. For Desjardins, participating in Rendez-vous du Savoir is an opportunity to do our part in this collective responsibility.

Through a series of initiatives, Desjardins Group is committed to boosting its leadership in the areas of education and training.

For example, our corporate university, the Desjardins Cooperative Institute, plans to intensify its partnerships with Quebec and Canadian universities by setting up a round table on various fields of knowledge and competencies.



DR. PAVEL HAMET

I am very pleased to once again be co-spokesperson for this year's edition of Rendez-vous du Savoir. Bringing together universities – the lifeblood of knowledge – and the business community gives us a unique opportunity to recognize the immense wealth generated by our universities and scientific institutions, which we must continue to tap into in order to boost our competitiveness and ensure our ongoing development.

This year's theme – *How Universities Contribute to Business Development* – is an important topic because knowledge-based societies must be able to effectively transfer knowledge and a constant stream of innovation to industry, which in turn, must be encouraged to forge links with academia, and in so doing, expand our collective creativity and wealth.

The Fondation Desjardins – a private foundation that grants the most university bursaries in Quebec – will step up its actions to encourage and support the next generation. We have also launched a program to host over 100 interns each year.

Both the business and academic communities stand much to gain by building stronger ties and cooperating more. The very ability of our organizations to innovate and stand out here and abroad depends on it.

We commend Rendez-vous du Savoir for its efforts to give universities a bigger role to play in business success.

—
Monique F. Leroux
Chair of the Board, President and CEO
Desjardins Group

—
Dr. Pavel Hamet, O.Q., M.D., Ph.D.
Senior Professor in the Department of Medicine
at Université de Montréal
and Canada Research Chair, Predictive Genomics

MESSAGE FROM THE ASSOCIATED SPONSOR



MARTINE TURCOTTE

Bell is the associated sponsor of the Rendez-vous du Savoir.

Bell is pleased to be the associated sponsor of the second edition of Rendez-vous du Savoir. For Bell, this association is a good fit because we have always tried to forge strong ties with universities in the communities we serve, either through university chairs, research programs or student internships.

In an increasingly knowledge-based economy, university-industry collaboration has become more important than ever before.

For a few years now, companies in key sectors of our economy, particularly ICT, have been confronted with a shortage of qualified workers. In this regard, teaming up with universities is a win-win strategy for industry, universities and students alike.

But aside from helping to reduce the labour shortage, universities also play a key role in advancing research, and their work is synonymous with innovation and development. In light of the Léger Marketing survey results, it seems that many Quebec companies have yet to discover this potential.

An initiative such as Rendez-vous du Savoir is an opportunity to jumpstart a dialogue between industry and academia in the hopes of promoting cooperation and paving the way to innovation. Because when you think about it, any resulting development will benefit society as a whole.

—
Martine Turcotte
Executive Vice-President – Quebec
Bell

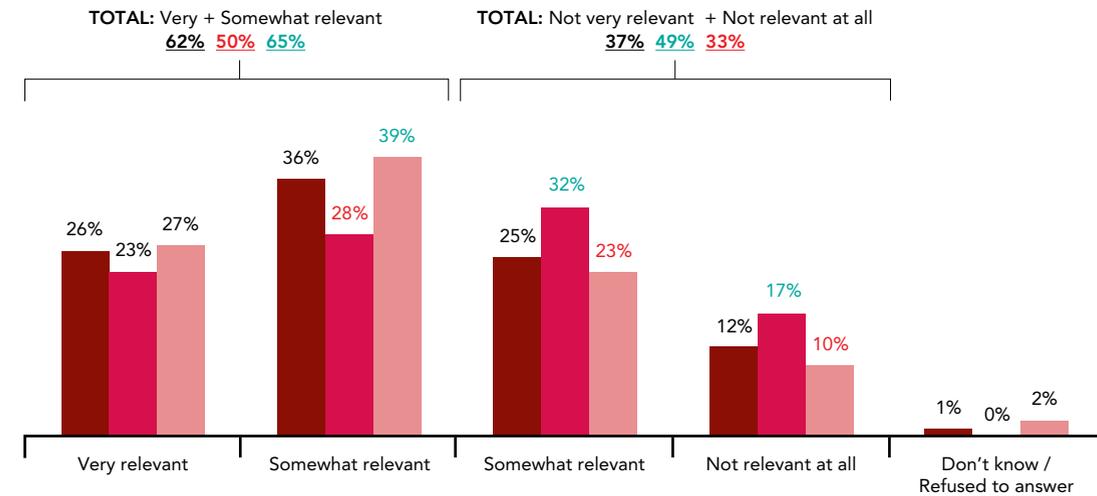
APPENDIX: DETAILED ANALYSIS OF RESULTS

UNIVERSITY-INDUSTRY COLLABORATION

Q1 DO YOU BELIEVE THAT UNIVERSITY-INDUSTRY COLLABORATION IS VERY RELEVANT, SOMEWHAT RELEVANT, NOT VERY RELEVANT, OR NOT AT ALL RELEVANT TO YOUR COMPANY'S DEVELOPMENT?

Base: All respondents

■ Total (n=402)
■ Quebec (n=202)
■ Rest of Canada (n=200)

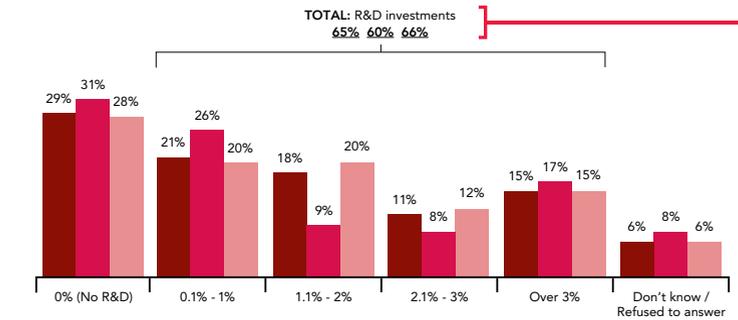


* The question was slightly different in 2010. Collaboration was deemed relevant "for business growth and visibility."

Q2 WHAT PERCENTAGE OF YOUR COMPANY'S GROSS REVENUES IS ALLOCATED TO R&D?

Base: All respondents

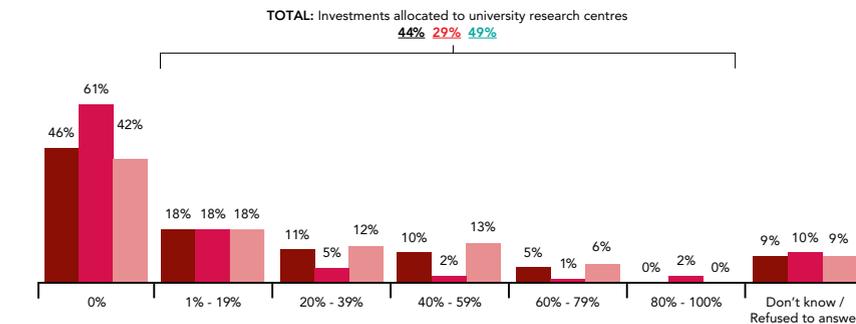
■ Total (n=402)
■ Quebec (n=202)
■ Rest of Canada (n=200)



Q2A WHAT PROPORTION OF YOUR R&D SPENDING IS ALLOCATED TO UNIVERSITY RESEARCH CENTRES?

Base: Companies that invest in R&D

■ Total (n=282)
■ Quebec (n=139)
■ Rest of Canada (n=143)

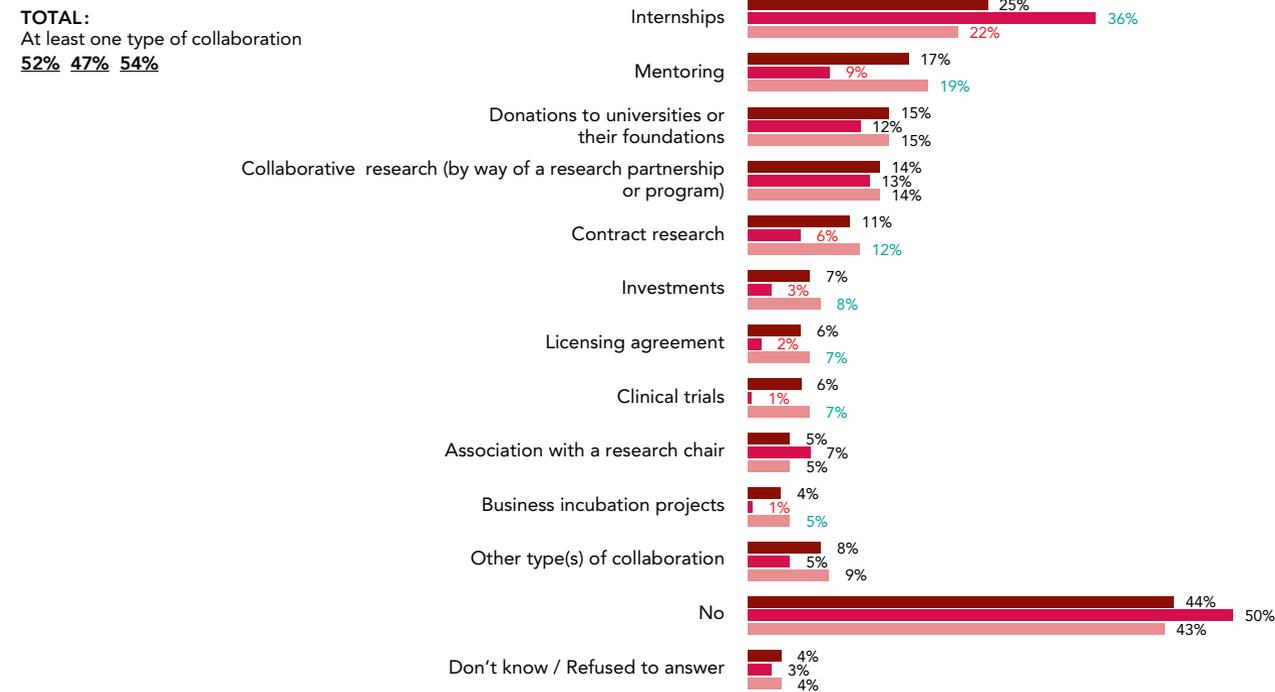


Q3 IN THE LAST THREE YEARS, HAS YOUR COMPANY COLLABORATED WITH A UNIVERSITY IN WAYS OTHER THAN HIRING STUDENTS OR GRADUATES? IF SO, WHAT KIND OF COLLABORATION WAS INVOLVED? MORE THAN ONE ANSWER POSSIBLE.

Base: All respondents

■ Total (n=402)
 ■ Quebec (n=202)
 ■ Rest of Canada (n=200)

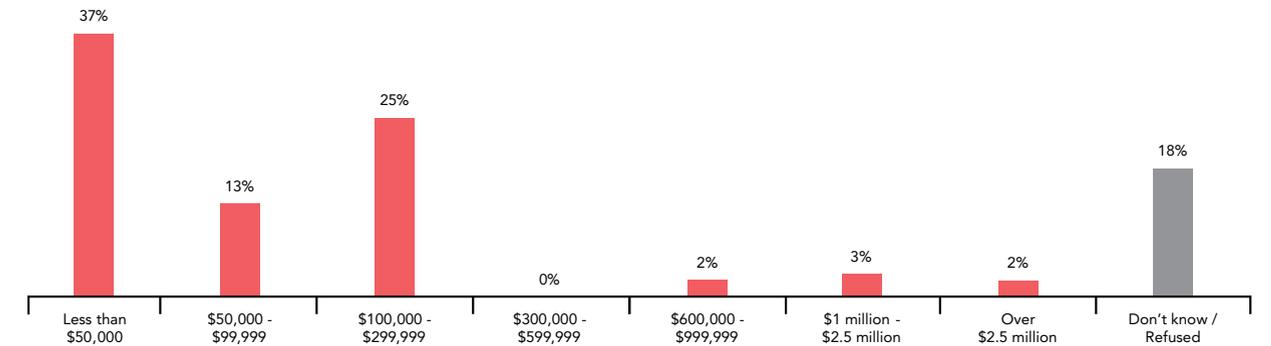
* Since respondents could choose more than one answer, the total mentions may be greater than 100%.



Q3A APPROXIMATELY HOW MUCH DOES YOUR COMPANY DONATE ANNUALLY (IN CANADIAN DOLLARS) TO UNIVERSITIES OR UNIVERSITY FOUNDATIONS?

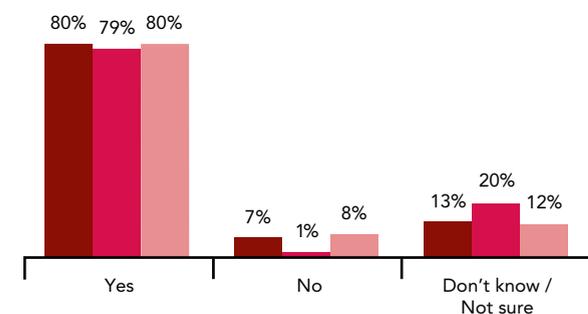
Base: Companies that have made donations to universities or their foundations (n=51)*

* Given the low number of respondents (n=51), the data is presented for the total number of respondents only.



Q4 DO YOU PLAN TO CONTINUE COLLABORATING WITH UNIVERSITIES IN THE FUTURE?

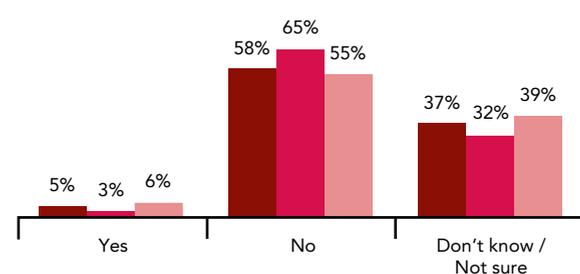
Base: Companies **that have collaborated** with a university in the last three years



Q4
 ■ Total (n=200)
 ■ Quebec (n=94)
 ■ Rest of Canada (n=106)

Q5 ARE YOU PLANNING TO COLLABORATE WITH A UNIVERSITY IN THE FUTURE?

Base: Companies **that have not collaborated** with a university in the last three years



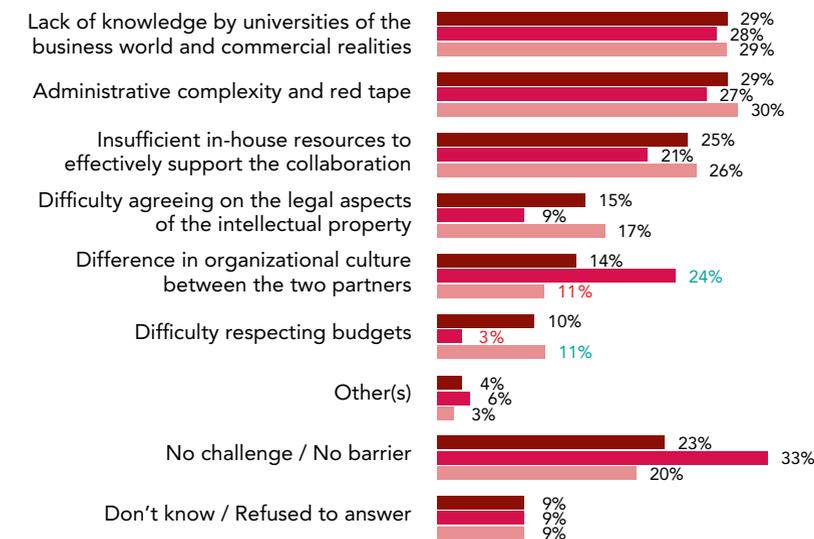
Q5
 ■ Total (n=188)
 ■ Quebec (n=101)
 ■ Rest of Canada (n=87)

■ Total (n=200)
 ■ Quebec (n=94)
 ■ Rest of Canada (n=106)

* Since respondents could choose more than one answer, the total mentions may add up to more than 100%.

Q6 WHAT CHALLENGES, IF ANY, DID YOU ENCOUNTER DURING YOUR UNIVERSITY COLLABORATION OR WHAT OBSTACLES PREVENTED A COLLABORATION? MORE THAN ONE ANSWER POSSIBLE.*

Base: Companies **that have collaborated** with a university in the last three years

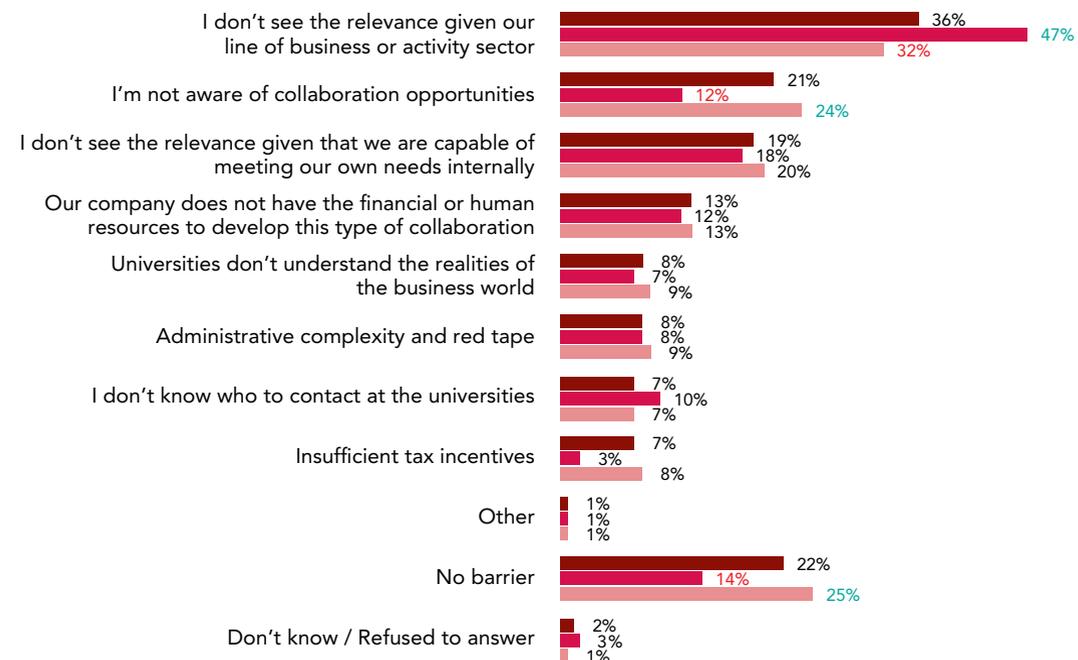


Q7 WHAT OBSTACLES LED YOU TO DECIDE NOT TO COLLABORATE WITH UNIVERSITIES IN THE LAST THREE MORE THAN ONE ANSWER POSSIBLE.*

Base: Companies **that have collaborated** with a university in the last three years

■ Total (n=188)
■ Quebec (n=101)
■ Rest of Canada (n=87)

* Since respondents could choose more than one answer, the total mentions may add up to more than 100%.

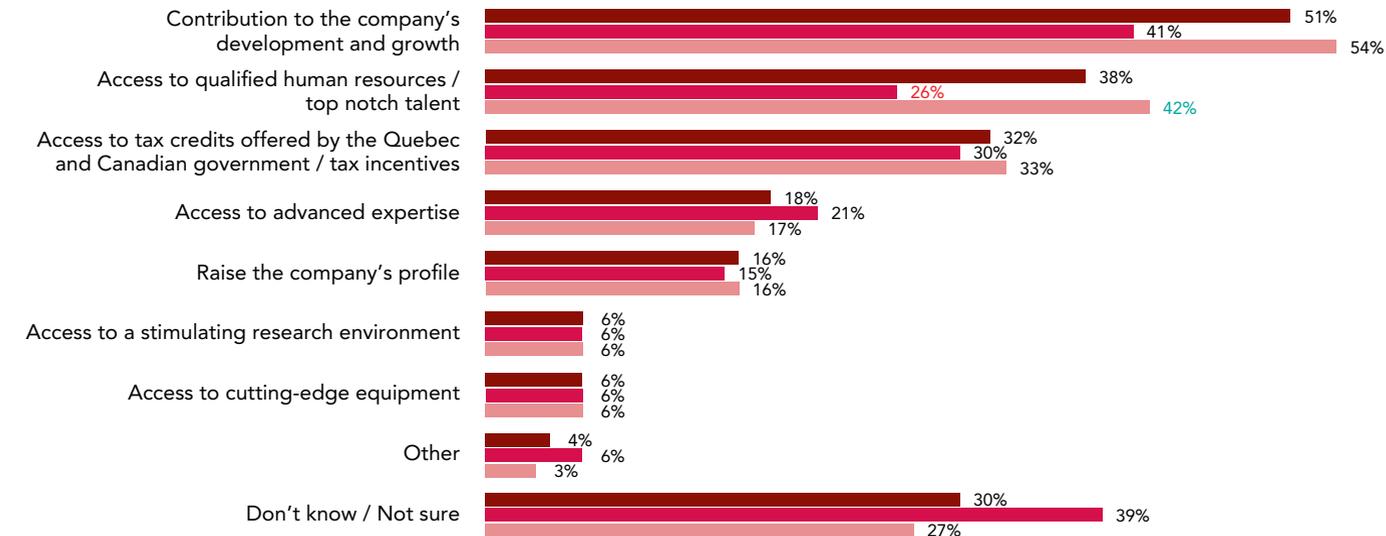


Q8 WHAT WOULD MOTIVATE YOU THE MOST TO COLLABORATE WITH A UNIVERSITY? MORE THAN ONE ANSWER POSSIBLE - TOTAL OF 1ST, 2ND AND 3RD INCENTIVES*

Base: Companies **that have not collaborated** with a university in the last three years

■ Total (n=188)
■ Quebec (n=101)
■ Rest of Canada (n=87)

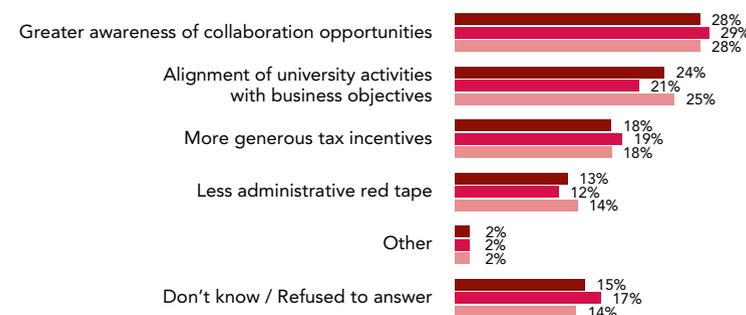
* The results are the total of the first, second and third incentives mentioned. The vertical total is therefore greater than 100%.



Q9A WHAT WOULD MAKE A FUTURE COLLABORATION BETWEEN YOUR COMPANY AND A UNIVERSITY MORE LIKELY OR MORE EFFECTIVE? ONLY ONE ANSWER POSSIBLE.

Base: All respondents

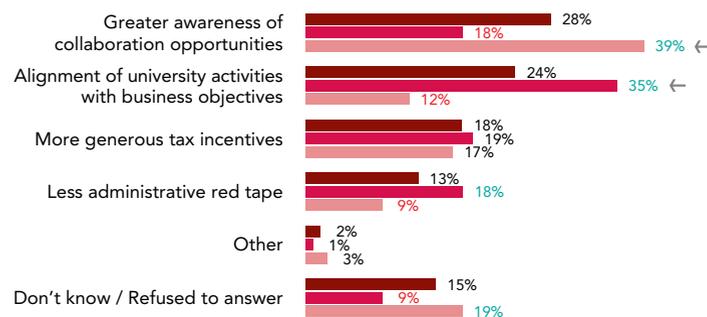
■ Total (n=402)
■ Quebec (n=202)
■ Rest of Canada (n=200)



Q9B WHAT WOULD MAKE A FUTURE COLLABORATION BETWEEN YOUR COMPANY AND A UNIVERSITY MORE LIKELY OR MORE EFFECTIVE? ONLY ONE ANSWER POSSIBLE.

Base: All respondents

■ Total (n=402)
■ Has collaborated before (n=200)
■ Has not collaborated (n=188)

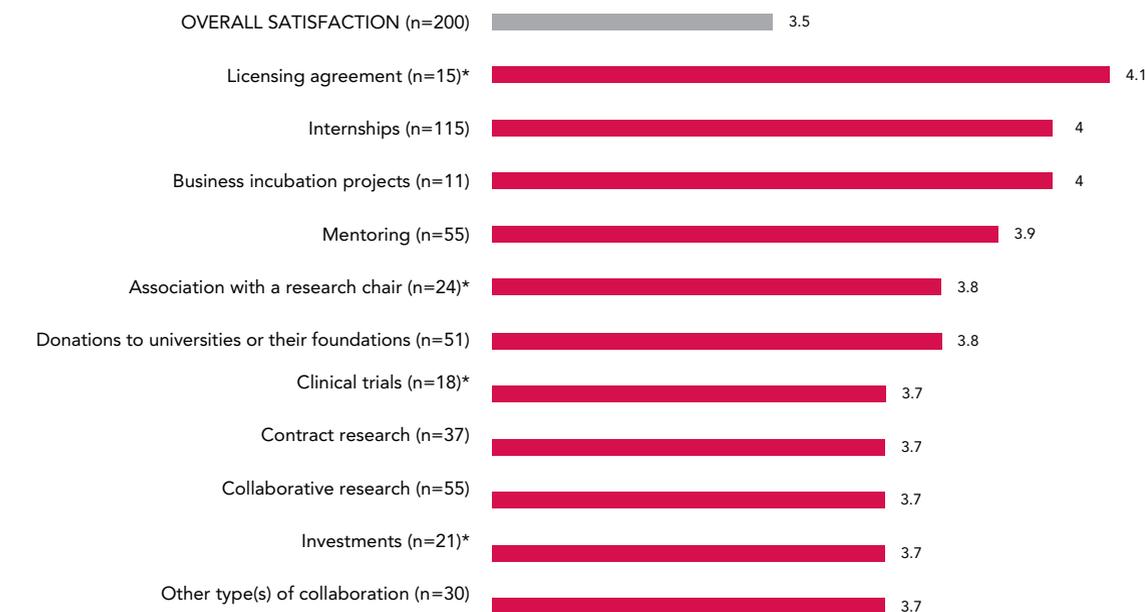


* Since respondents could choose more than one answer, the total mentions may add up to more than 100%.

Q10 ON A SCALE OF 1 TO 5, WHERE 1 MEANS VERY DISSATISFIED AND 5 MEANS VERY SATISFIED, HOW SATISFIED ARE YOU OVERALL WITH YOUR UNIVERSITY COLLABORATION IN TERMS OF RETURN ON INVESTMENT, I.E. TIME AND MONEY SPENT?

Base: Companies that have collaborated with a university in the last three years (n=200)

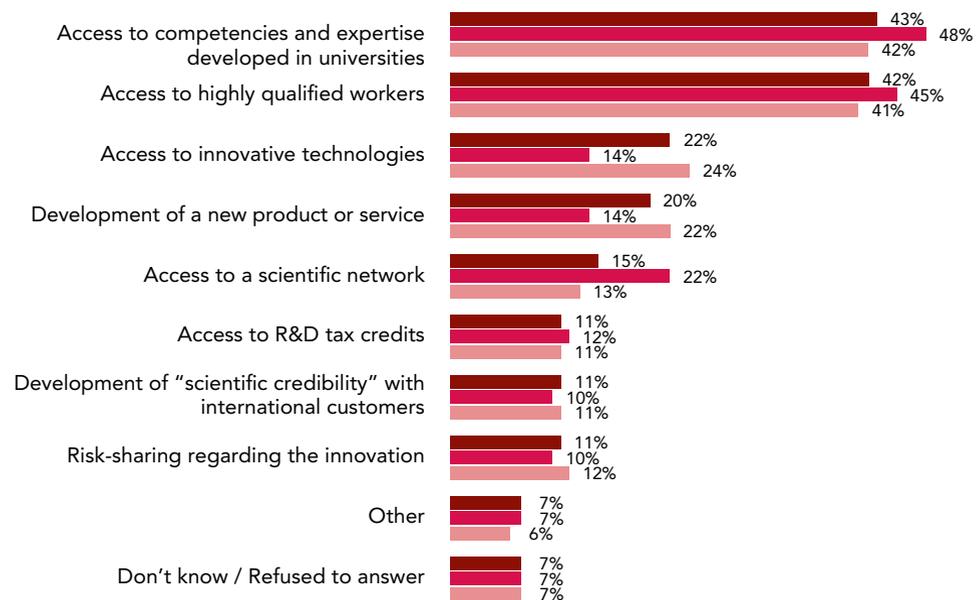
* Given the low number of respondents (n<30), the data is presented for information purposes only. As well, given the low number of respondents, the results are presented on a total basis only. No significant regional differences were observed for overall satisfaction.



Q11 WHAT BENEFITS DID YOU DERIVE FROM YOUR UNIVERSITY COLLABORATION? UP TO THREE ANSWERS POSSIBLE*

Base: Companies **that have collaborated** with a university in the last three years

■ Total (n=200)
■ Quebec (n=94)
■ Rest of Canada (n=106)

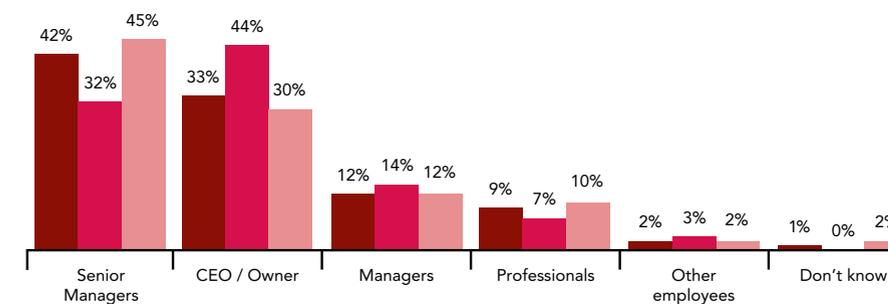


* Since the respondents could choose up to three answers, the vertical total may be greater than 100%.

Q12 WHO (HIERARCHICAL RANK) WITHIN YOUR ORGANIZATION IS IN CHARGE OF ESTABLISHING UNIVERSITY PARTNERSHIPS?

Base: Companies **that have collaborated** with a university in the last three years

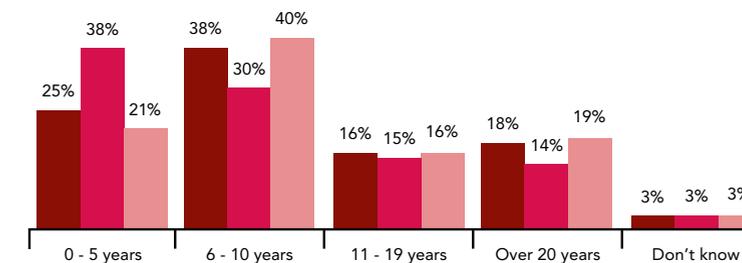
■ Total (n=200)
■ Quebec (n=94)
■ Rest of Canada (n=106)



Q13 HOW MANY YEARS HAS YOUR COMPANY BEEN COLLABORATING WITH UNIVERSITIES?

Base: Companies **that have collaborated** with a university in the last three years

■ Total (n=200)
■ Quebec (n=94)
■ Rest of Canada (n=106)

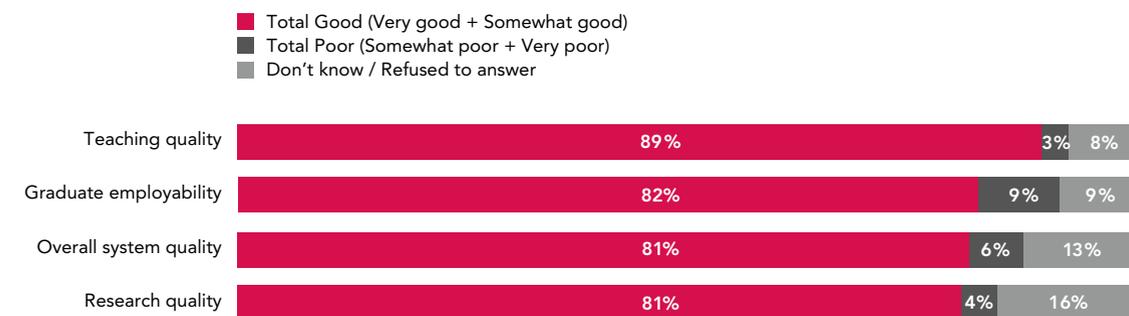


* Since the respondents could choose up to three answers, the vertical total may be greater than 100%.

PERCEPTION OF THE UNIVERSITY SYSTEM

Q14 IN YOUR OPINION, IS THE UNIVERSITY SYSTEM IN YOUR PROVINCE VERY GOOD, SOMEWHAT GOOD, SOMEWHAT POOR OR VERY POOR IN THE FOLLOWING AREAS?

Base: All respondents (n=402)



Q15 IN YOUR OPINION, WHICH OF THE FOLLOWING IS THE BEST UNIVERSITY CITY IN NORTH AMERICA? UP TO THREE ANSWERS POSSIBLE.*

Base: All respondents (n=402)

* Since the respondents could choose as many as three answers, the vertical total may be greater than 100%.

	TOTAL (n=402)	Quebec (n=202)	Rest of Canada (n=200)
TOTAL United States	73%	74%	73%
Boston	59%	71%	55%
New York	19%	12%	21%
Los Angeles	13%	14%	12%
Chicago	8%	9%	7%
San Francisco	6%	7%	6%
Philadelphia	4%	1%	5%
Washington	3%	5%	2%
Atlanta	2%	0%	3%
Baltimore	2%	0%	3%
Denver	2%	1%	2%
Miami	2%	1%	2%
Minneapolis-St-Paul	2%	0%	2%
Pittsburgh	2%	1%	2%
San Diego	2%	1%	2%
Seattle	2%	3%	2%
Cleveland	1%	1%	0%
Dallas	1%	1%	0%
Phoenix	1%	0%	2%

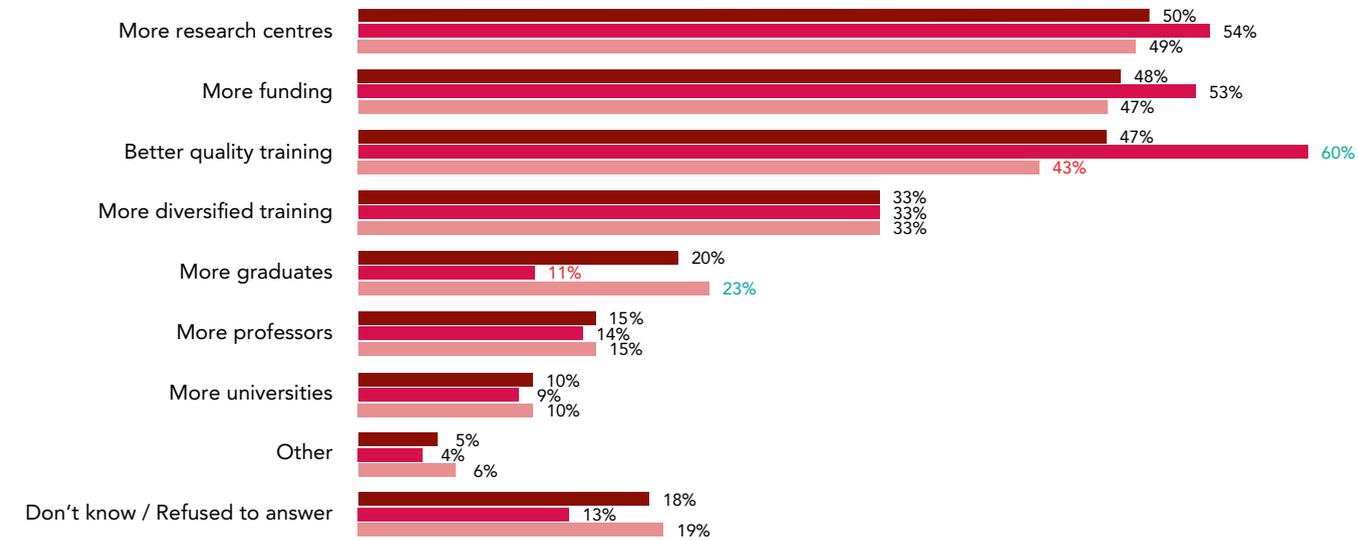
	TOTAL (n=402)	Quebec (n=202)	Rest of Canada (n=200)
TOTAL Canada	68%	62%	70%
Toronto	39%	16%	46%
Montréal	29%	50%	23%
Vancouver	10%	6%	12%
Edmonton	5%	0%	6%
Québec City	5%	13%	2%
Calgary	4%	0%	5%
Halifax	4%	0%	5%
Ottawa	4%	3%	5%
Winnipeg	2%	0%	3%
Other	7%	3%	8%
Don't know / Refused to answer	10%	14%	9%

Q16 IN YOUR OPINION, WHAT IS YOUR CITY MISSING TO BECOME THE NORTH-AMERICAN BENCHMARK FOR UNIVERSITY EDUCATION? MORE THAN ONE ANSWER POSSIBLE - TOTAL OF 1ST, 2ND AND 3RD MENTIONS*

Base: All respondents (n=402)

■ Total (n=402)
■ Quebec (n=202)
■ Rest of Canada (n=200)

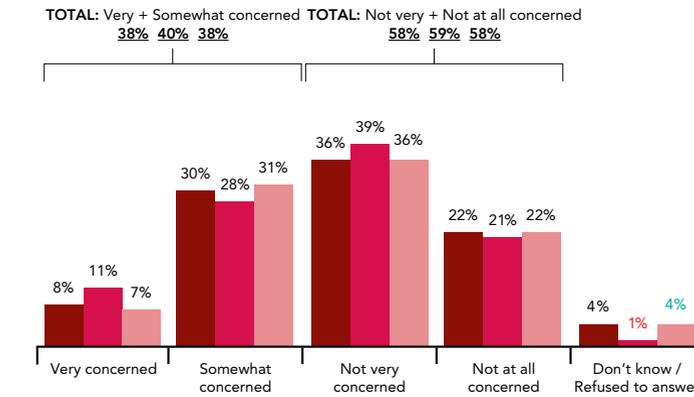
* The results include the first, second and third most important elements. The vertical total is therefore greater than 100%.



Q17 HOW CONCERNED ARE YOU ABOUT THE AVAILABILITY OF UNIVERSITY-EDUCATED WORKERS FOR THE DEVELOPMENT OF YOUR COMPANY IN THE YEARS AHEAD?

Base: All respondents

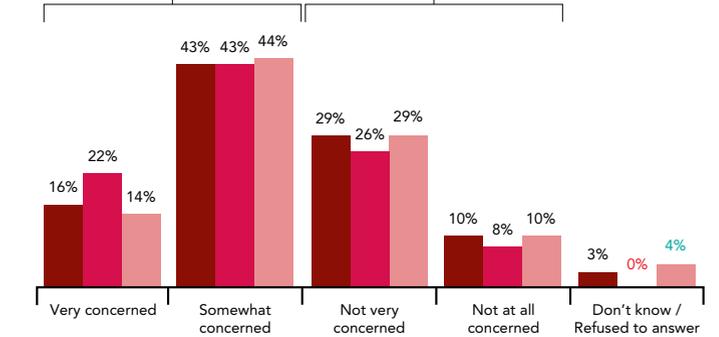
■ Total (n=402)
■ Quebec (n=202)
■ Rest of Canada (n=200)



Q18 HOW CONCERNED ARE YOU ABOUT THE AVAILABILITY OF UNIVERSITY-EDUCATED WORKERS FOR THE DEVELOPMENT OF YOUR PROVINCE IN THE YEARS AHEAD?

Base: All respondents

TOTAL: Very + Somewhat concerned: 59% 65% 57%
TOTAL: Not very + Not at all concerned: 38% 35% 39%



RESPONDENT PROFILE

Note: For each profile category, the complement to 100% corresponds to the mentions "Don't know" and "Refused to answer."

	Total (n=402)	Quebec (n=202)	Reste du Canada (n=200)
Province			
Ontario	36%	0%	47%
Quebec	23%	100%	0%
British Columbia	14%	0%	18%
Alberta	13%	0%	17%
Manitoba	4%	0%	5%
Nova Scotia	3%	0%	3%
New Brunswick	3%	0%	4%
Saskatchewan	3%	0%	4%
Newfoundland and Labrador	1%	0%	1%
Position			
CEO/Owner	44%	51%	42%
Vice-president	26%	20%	27%
Co-owner / Partner	18%	14%	19%
Regional manager	12%	14%	12%
Language Of Business			
French	28%	89%	10%
English	69%	11%	87%
Other	2%	0%	2%

	Total (n=402)	Quebec (n=202)	Rest of Canada (n=200)
Activity Sector			
Retail	13%	22%	10%
Finance, insurance and real estate	11%	11%	10%
Manufacturing	11%	7%	12%
Construction	8%	4%	9%
Distribution / Wholesale	6%	5%	6%
Engineering, accounting, research and management	6%	4%	7%
Health services	6%	3%	7%
Personal and business services	6%	5%	6%
Transportation, communication and utilities	6%	9%	6%
Education and social services	5%	9%	4%
Agriculture, fisheries and forests, and mines	3%	1%	3%
Government	2%	1%	3%
Associations, organizations, and religion	1%	1%	1%
Legal services	1%	0%	2%
Other	14%	14%	14%
Number of Years In Business			
0 to 4	2%	3%	2%
5 to 9	9%	10%	9%
10 to 19	22%	24%	21%
20 to 49	39%	43%	38%
50 years and more	28%	20%	30%

Note: For each profile category, the complement to 100% corresponds to the mentions "Don't know" and "Refused to answer."

	Total (n=402)	Quebec (n=202)	Rest of Canada (n=200)
Number of employees			
50 to 99	18%	18%	18%
100 to 249	13%	7%	15%
250 to 499	10%	8%	10%
500 and more	19%	15%	21%
Sales			
\$1 to \$4.9 million	39%	44%	37%
\$5 to \$9.9 million	16%	15%	17%
\$10 to \$49.9 million	21%	20%	21%
\$50 million and more	24%	21%	25%
Position Requiring a University Degree			
TOTAL Yes	70%	65%	72%
Yes, less than 10%	15%	20%	14%
Yes, 10% to 20%	12%	12%	13%
Yes, 21% to 40%	13%	11%	13%
Yes, 41% to 60%	11%	9%	11%
Yes, 61% to 80%	10%	5%	12%
Yes, more than 80%	9%	6%	10%
No, none	28%	35%	26%
Member of a Chamber of Commerce			
Yes	51%	45%	53%
No	49%	55%	47%
Member Of The Board Of Trade Of Metropolitan Montreal Base: Quebec companies that belong to a chamber of commerce (n=91)			
Yes	33%	33%	N/A
No	67%	67%	N/A



NOTES
