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## STRUCTURAL PARADIGM OF INNOVATIVE AND INVESTMENT PARTNERSHIP

**Abstract.** The article is focused on finding a new and modification of the existing paradigms of the innovative and investment partnership formation. The article studies the perspective key members of innovative partnership, their roles and possible cooperation effects. The attention is focused on the choice of directions of the innovative process realization depending upon the comparative assessment of approaches and the innovation commercialization expenses. The author outlines the direct and indirect form of the innovative partnership: «enterprise — university» and «enterprise — innovative mediator — university».

The analysis of the profit-making channels in each chosen type of cooperation is provided. The globalization and capital concentration platforms preceding the integration partnership agreements are outlined and analyzed.

To build up a separate adaptive paradigm of the innovative partnership the factors of the inner and outer environment forming the barriers for the realization of successful innovation partnership models are analyzed.

It was found that one more factor to be considered when choosing the forms of innovative partnership between the parties concerned is the payback from the innovation commercialization. Its amount will be impacted by the objective factors of the currency depreciation in time, level of the sci-tech progress development, facilitation of the state policy, selected priorities of the national strategies, etc. Concerning the subjective factors, they fall within the variety of behavioral characteristics of an individual.

It is stated that the formation of the innovative partnership is closely connected with the regional peculiarity of the location of enterprises, institutions and organizations. It is suggested to outline the innovative export-oriented and innovative import-dependent regions of the country. This feature will cover the possibilities of acquisition of innovations, knowledge and experience, and resources for their realization from the inner and outer markets.

One of the factors of the commercial success achievement with the chosen form of the innovative partnership is the Blue Ocean Strategy which will allow studying the market more in detail and find the market niches in need of such new integrative formations. The incorporation of spin-off and spin-out companies is outlined as an efficient direction of the innovative partnership grounds realization.

The article was prepared with the application of the following methods: expert appraisal, analysis and synthesis, economic experiment and scientific abstraction as well as graphic and logical methods.

**Keywords:** innovative partnership, innovative process, innovation, business model of the innovative partnership, innovative mediator, innovation commercialization.

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## СТРУКТУРНА ПАРАДИГМА ІННОВАЦІЙНО-ІНВЕСТИЦІЙНОГО ПАРТНЕРСТВА

**Анотація.** Зосереджено увагу на виявленні нової та модифікації чинної парадигми формування інвестиційно-інноваційного партнерства. Досліджуються основні ймовірні учасники інноваційного партнерства, їхні ролі та можливі ефекти від співпраці. Акцентується увага на виборі напрямів реалізації результатів інноваційного процесу залежно від порівняльної оцінки доходів і витрат комерціалізації інновації. Запропоновано виокремити пряму і непрямую форми інноваційного партнерства: «підприємство — університет» і «підприємство — інноваційний посередник — університет».

Здійснено аналіз способів отримання доходу за кожного обраного виду співпраці. Виокремлено і проаналізовано платформи глобалізації та концентрації капіталів, які передують інтеграційним партнерським угодам.

Для побудови окремої адаптивної парадигми інноваційного партнерства проаналізовано фактори зовнішнього і внутрішнього середовища, що формують бар'єри для реалізації успішних інноваційних партнерських моделей.

Виявлено, що ще одним фактором, який варто враховувати при виборі форм інноваційного партнерства між усіма зацікавленими сторонами, є фінансова віддача від комерціалізації інновації. На її величину впливатимуть об'єктивні фактори зниження вартості грошей у часі, рівень розвитку науково-технічного прогресу, сприяння державній політиці, обрані пріоритети національної стратегії тощо. Щодо суб'єктивних факторів, то їхній перелік лежить у множині поведінкових характеристик особистості.

Зазначено, що формування напряму інноваційного партнерства тісно пов'язане з регіональною особливістю розташування підприємств, установ та організацій. Запропоновано виділяти інноваційно експортноорієнтовані та інноваційно імпортозалежні області чи регіони країни. Така ознака охоплюватиме можливості отримання інновацій, знань і досвіду, а також ресурсів для їхньої реалізації з внутрішніх чи зовнішніх ринків.

Одним із факторів отримання комерційного успіху за обраною формою інноваційного партнерства рекомендовано використати стратегію «блакитного океану», що дозволить детальніше провести дослідження ринку і виявити наявність ринкових ніш, які потребуватимуть уваги таких нових інтеграційних утворень. Виокремлено як ефективний напрям реалізації засад інноваційного партнерства — створення spin-off і spin-out компаній.

Використано методи експертних оцінок, аналізу і синтезу, економічного експерименту та наукової абстракції, а також графічний і логічний методи.

**Ключові слова:** інноваційне партнерство, інноваційний процес, інновація, бізнес-модель інноваційного партнерства, інноваційний посередник, комерціалізація інновації.

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**Introduction.** Education dualism and practical orientation of the players outline the necessity of platforms for the investment partnership between the educational institutions, enterprises and academic institutions. Actualization of cooperation is defined by the necessity of creating such paradigm of the investment and innovative partnership which could be adaptive in the dynamic environment, could be applied to different centers of liability, would provide for the unity of interests of the business-sectors, educational institutions, academic organizations and individuals as a resource of the ideas formation, changes initiator and decision-maker.

**Researches analysis.** The works of the following national scholars are dedicated to the analysis of the separate aspects of the innovations commercialization process, including the models, mechanisms and factors of the innovative process realization: V. Anshyna [1], Yu. Kovtunenکو [2], M. Kalinichenko [3], R. Kravchenko [4], O. Priadchenko [5], etc.

**Purpose and objectives of the study.** The purpose of the study is to update the innovative partnership between business structures and educational institutions. Tasks — formation of the structural paradigm of innovation partnership, identification and analysis of the effects of the innovation process for enterprises and universities. The methodological tools of the research are constituted by the methods of the scientific abstraction, in the aspect of finding the forms of the innovative process and economic modeling.

Conceptually important is also the formation of the liabilities and financial results allocation within the partnership both at the micro- and macro-levels. To create the cooperation models the key subjects interested in the realization of such cooperation shall be outlined. They include: Two major parties (investor and investments recipient, enterprise and educational institution, academic education and business) and mediator who, depending upon major players, may gain the form of financial organization (investment fund and company, dealer or broker), innovative mediator and enterprise rendering the specialized services at the investment market (engineering, project, real estate agents) etc. It would be desirable to form the separate structural subdivisions of the enterprises to manage the cooperation between the business and science, be liable for the formation of the scholarly grounds of ideas which appeared in the business-environment and run the commercialization process of the ideas which appear in the research section of educational institutions. Such separate structural subdivisions can be represented by the innovative creative centers of enterprises, creative groups, innovations commercialization sections, etc.

Through the application of the mediation organizations services the cooperation between the partners can be direct and indirect. The number of partners can vary depending upon the specificity of agreement, sale and purchase object, benefits of the parties concerned, license agreement, etc.

Studying the innovative partnership options the direct and indirect relations should be considered. The direct relations form the paradigm «enterprise-university» where each party is the bearer of the specific interest: The enterprise seeks the new, non-standard solutions and their substantiation to strengthen its competitive environment and the university seeks to create the additional financial resources to realize its core activity objective for the purpose of creating the dual education platform.

Currently the mentioned cooperation is in the conditions of high probability of the force-majeure circumstances in the inner and outer environment of each party. Substantial role in the formation of the new paradigm of the innovative partnership under the economic environment globalization conditions and capital concentration shall belong to the state, since under its guidance the gap between all parties concerned is filled within the creation and commercialization of innovations. Traditional forms of cooperation between the players at the innovative market are based on the determination of the specific features of the innovation commercialization method and forms of payment for the license received. Such choice is viable during the elaboration of the income and losses channels in each direction of the innovative process results realization (*Table 1*).

Table 1

**Types of income and losses within each direction of innovative process results realization**

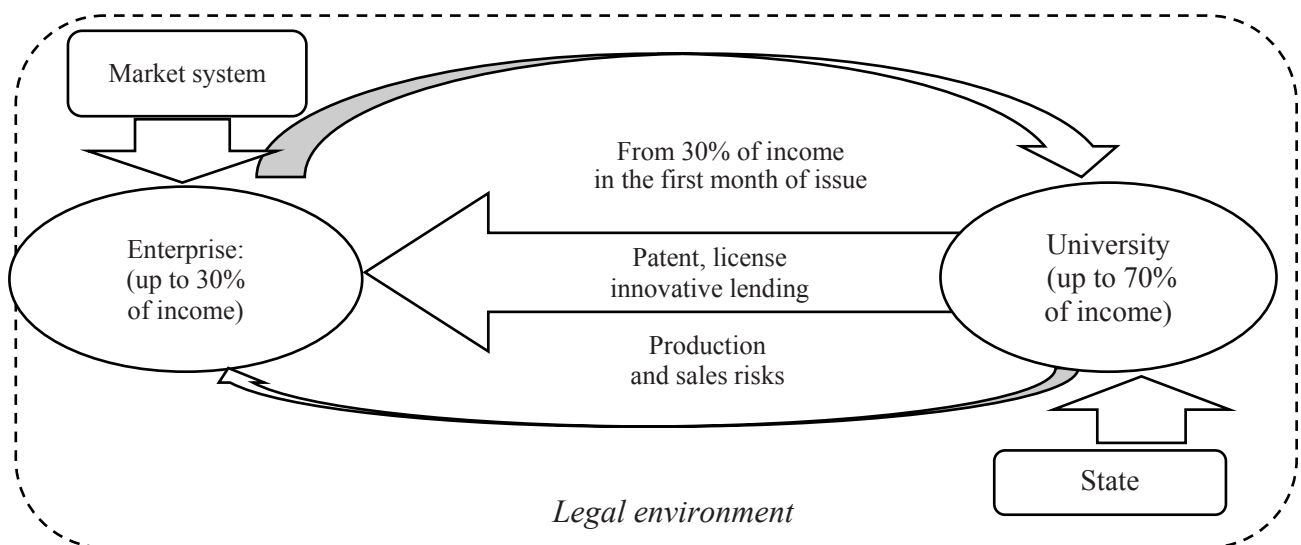
Ref. №	Directions of the innovative process results application	Income of enterprise	Losses of enterprise
1	Application in own production	1. Income from the idea sales proceeds. 2. Income from the intellectual property object sales proceeds. 3. Income from the engineering services. 4. Cash flow from the equipment leasing.	1. Expenses for the maintenance of the enterprise creative potential. 2. Expenses for the production organization. 3. Expenses for the marketing research and advertising campaign. 4. Expenses for the modification and improvement of the enterprise products. 5. Expenses for the potential consumers attraction.
2	Transfer (sales) of rights to the innovation application	1. Proceeds from the sale of license for the innovation application (lump sum payment). 2. Payments from the licentiate's application of patent (royalty fee).	1. Expenses for the modification or improvement of products unless manufactured by the licentiate. 2. Expenses for the licentiates' involvement. 3. Expenses for rendering the consultations to the licentiate during purchasing the license for the intellectual property object application. 4. Expenses for the patent rights protection.
3	Application of the intellectual property objects shared with the investor	The patent rights sales proceeds	1. Expenses for the rights purchasers attraction. 2. Expenses for rendering the consultations during purchasing of rights to the intellectual property object.

Source: [6].

Transfer and shared application of the idea, innovation, provides for the execution of license agreement with the specified payment type: Lump sum (one-time) payment or royalty (flow).

Granting the license by the university to the enterprise for the realization and implementation of idea into the production process or through the payment of the lump sum to the former as one-time reward will reduce the risk of the reward loss in time. The long-lasting partnership can be guaranteed by the transfer of certain number of the enterprise's shares as an ownership to the university.

Such business-model provides for the transfer of right to the protected industrial ownership in the form of patent for invention, utility model or industrial patterns to the university. The receipt of the one-time lump sum by the university allows covering the expenses for the idea development, research works realization. The model will be efficient on condition all parties of cooperation provide for the formation and realization of the competitive object of the license agreement (Fig. 1).



**Fig. 1. Business-model of the innovative partnership «enterprise — university»**

Source: created by the author.

The other option of cooperation is the transfer of idea together with its research and practical justification to the enterprise. In this case the enterprise which researched the idea applicability, performed marketing studies of the market, assessment of the potential demand will be the main licensor. In such form of cooperation the university shall be paid for the information provision.

The enterprise shall also pay the compensation, with its products, if such condition is prescribed by the license agreement, or the royalty, for the idea application during the pre-defined period. Conceptually important is the allocation of liabilities between the employee and employer in each mentioned party.

The allocation of rights can be implied by the license agreement unless otherwise provided for by the enterprise documentation. If the employee's liabilities include the creation of the intellectual property objects, the material right to these objects will belong to the employer, since the employee is remunerated for the fulfillment of its obligations in the form of salary and different additional and compensatory payments.

Such situation is also possible with the university, therefore, it is important to indicate such condition in concluding the employment contract, such practice is provided for in the EU countries. In Ukraine, due to the persistence of the academic processes at the educational institutions most of the results of creative, scientific activity of the academic staff, part of the grants for their development belongs to the universities which demotivates the innovative and creative activity of the staff. The aggravation of the situation is possible in case of the involvement of the third-party organization, practical and financial aid of which produced the invention, utility model or industrial pattern. The demand of such organization can concern the possibility of transferring the intellectual property right as an ownership to such organization.

The second variant of creating the partnership between the mentioned parties is the indirect partnership with the application of the innovative mediator services who can act as a technological broker managing the commercialization, market research and rendering the consulting services.

For the enterprises-investors, the technological brokers provide the explanations, consulting services in the elaboration of technical documents and idea substantiation, for the universities they provide the innovation commercialization services. Organization inviting the mediator, may transfer 1—2% from the amount of the commercialized product to such mediator or such other amount stated in the agreement. The mediator can be presented in the form of the innovative enterprise, then the sphere of its activity in the aspect of the innovative process is wider than in the market process. The role of mediator can be assumed by the separate subdivision of the enterprise, assuming the liability for the execution of certain tasks in commercialization in front of the university and, in so doing, can use the patent commercialization. The role of mediator can be determined by two key activity directions:

- services in signaling on the appearance of the demand (for the new goods, new sales methods and goods promotion, consumers information etc) to the educational institution which can come up with the idea to solve the problem and satisfy the demand;
- services in transferring the ideas from the universities through the design documentation elaboration, technical and economic grounding to the enterprises transforming the intellectual property into its real-valued form (*Fig. 2*).

Depending upon the tasks arising in front of all parties of the market interaction, large scale of the innovation creation processes, organization which will render the services in the idea and innovative decision implementation, may be relocated within the enterprise structure and become the subdivision concentrated on the performance of its own tasks and the tasks of university in the idea commercialization and within the structure of the university transforming it into the education and production complex.

Such subdivision, depending upon the functions performed, may take the direction of creative non-standard thinking or concentrate on the organization of studies and testing.

This way the integrative formations will be created.

Economic platform for the creation of integrated platforms for the partnership was represented by the world market orientation towards the globalization and capital concentration

leading to the expenses minimization due to the large scale effect and consolidation of financial and intellectual capitals [7].

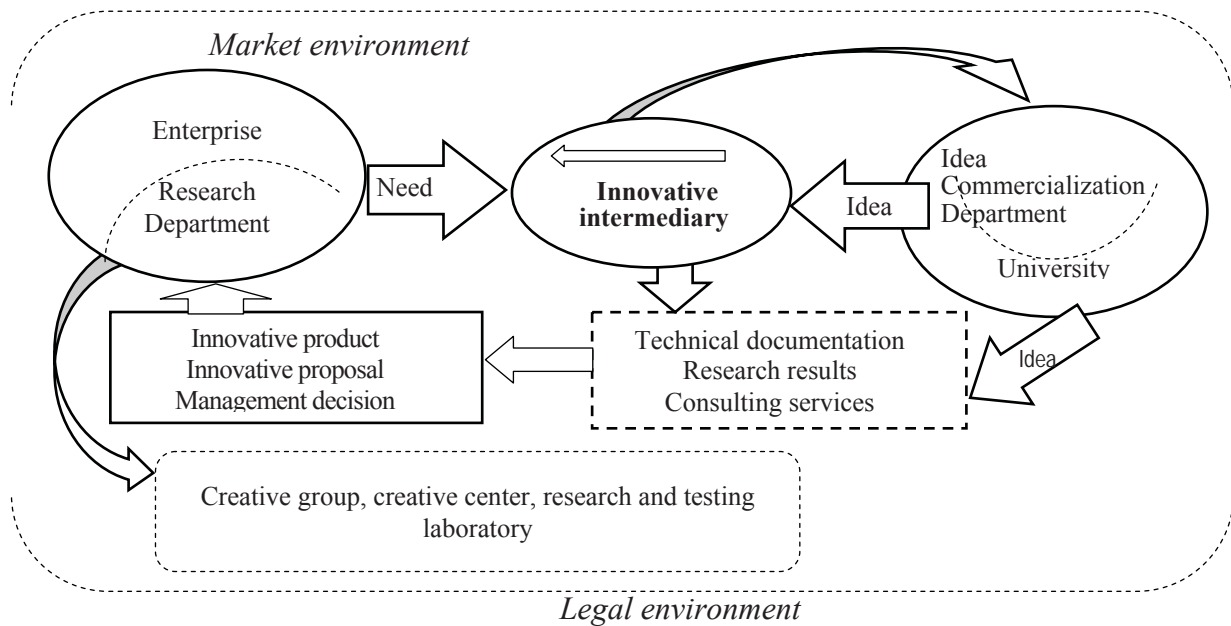


Fig. 2. Business-model of indirect innovative partnership

Source: author's development.

The economists of the Lisbon group analyze the concentration and globalization process in the investment partnership aspect, considering it as the multiple links at the seven inter-penetrating surfaces:

- Financial i.e. funding and capital possession;
- Market i.e. formation of the market strategies of the innovations introduction at the market and prolongation of the products life cycle relocating the factories and modifying the product;
- Technological i.e. studying the technological customs, studying the level of correlation between the knowledge and newest technologies;
- Cultural i.e. studying the way and level of life of the different social groups, consumer patterns and culture;
- Legal i.e. administration and regulation at the state and municipal levels;
- Political i.e. studying the level of political controversy and consolidation;
- Social i.e. formation and transformation of the social consciousness [8].

With regard to the impact of all inter-penetrating surfaces, the innovative partnership shall be considered as the process of integrated structuring of the business and scientific environment for the purpose of generation, formation and creation of the competitive, adaptive and market-successful innovations.

Focusing only on the advantages of the innovative partnership, there is a possibility to lose some orientation in the commercial and scientific environment and get substantially separated from the external conditions, therefore, certain negative externals of the inner and outer environment connected with the enterprises and universities activity characteristics shall be taken into account (Tabl. 2).

Table 2

**Negative impact of factors on the effectiveness of the investment  
and innovative partnership and ways of coping with them**

Negative impacts	Ways of coping with negative impacts
<i>Outer impact factors</i>	
Absence of interest to the creation and commercialization of innovations	<ul style="list-style-type: none"> <li>- provision of the fringe benefits system</li> <li>- facilitation of cooperation between different members of the innovative market and increase of efficiency of the innovations commercialization process</li> <li>- formation of the national program of studying as the catalyst for the commercial studies</li> <li>- insurance of the career development of the enterprise workers</li> </ul>
weak development of the financial markets in the sphere of innovative funding	<ul style="list-style-type: none"> <li>- formation of the financial stimuli for the innovative funding through the bank system</li> <li>- consideration of issue of innovations bank creation</li> <li>- insurance of the realization of the state and regional programs of the innovative projects funding</li> <li>- re-orientation of the ventures from the financial investments towards the spheres of priority</li> </ul>
Low attractiveness of the innovative projects, weakness of the knowledge and mechanism of the information exchange between the parties, absence of the effective market management policy	<ul style="list-style-type: none"> <li>- events aimed at the increase of attractiveness of the innovative projects through the consolidation of the system of priorities both at the level of their creation and at the level of management</li> <li>- steps towards the improvement of the mechanism of information exchange between the parties of the intellectual property objects commercialization process.</li> <li>- steps towards the improvement of the intellectual property market regulation policy</li> </ul>
Weak experience in cooperation between the business and scientific sectors of the national economics.	<ul style="list-style-type: none"> <li>- support program for the spin off / spin out companies</li> <li>- consulting services for the small and medium business</li> <li>- realization of the innovative partnership through the liability allocation and stages of the innovative process</li> </ul>
Availability of the «soft» funding»	<ul style="list-style-type: none"> <li>- increase of the economic duress of the innovative programs realization</li> <li>- increase of the role of competitiveness in the research grants awarding</li> <li>- wide application of the national programs</li> <li>- contracts between the government and scientific institutions</li> </ul>
<i>Inner impact factors</i>	
Loss of interest of the inventors to the commercialization of their own ideas	<ul style="list-style-type: none"> <li>- checking the object patentability, receipt of the right to the intellectual property object</li> <li>- encouragement and assistance in the enterprises creation through the cooperation with the scientific institutions</li> <li>- protection of the rights of the ideas initiators, inventors in the process of commercialization</li> </ul>
Weak development of the innovative culture	<ul style="list-style-type: none"> <li>- propagation and promotion of the success stories of the ideas commercialization projects</li> <li>- workers involvement into the formation of the system innovative development</li> <li>- system of the material and immaterial motivation</li> </ul>
Inner mechanisms of blocking the commercialization in the scientific institutions	<ul style="list-style-type: none"> <li>- provision of the possibility of getting the long-lasting benefits from the commercialization</li> <li>- overcoming the financial, legal and organizational obstacles for the effective process of the intellectual property objects commercialization</li> </ul>
Reduction of the quality of human capital in the scientific institutions	<ul style="list-style-type: none"> <li>- giving the grants for the researches of the young scientists</li> <li>- support of the academic activity and enterprise unification</li> </ul>

Source: [9].

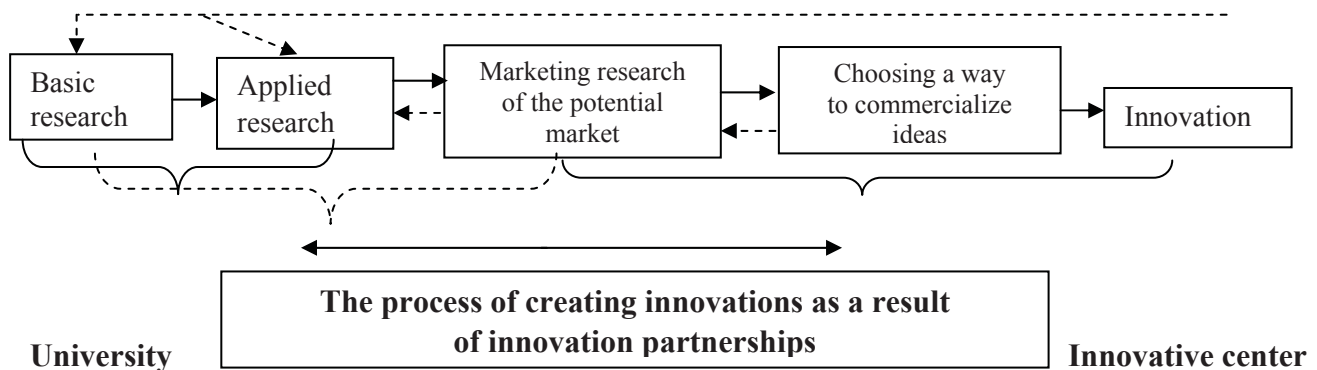
One more factor to be considered when choosing the forms and creation of the innovative partnership between the parties concerned is the payback from the innovation commercialization, Payback from the innovations commercialization may be reduced in future for the following reasons:

1. Changes of the currency depreciation in time.

2. Risk of technical and economic unrealizability of the idea.
3. Possibilities of increase of the expenses for the Research, Development and Engineering.

These three reasons are the result of the objective uncertainty of the future realization of innovation. With regard to the subjective reasons, they can include the conservatism in acceptance of the new information, absence of the additional motivation and other behavioral peculiarities of an individual.

Negative externals of the innovative process are leveled out by the possibilities of generating the highly-profitable effect from their introduction. With regard to this, the place of the innovations commercialization in the choice and realization of the investment and innovative partnership bases is determinant (Fig. 3).



**Fig. 3. Place of the innovations commercialization in the innovative partnership**

Source: author's elaboration.

Key mechanism of the enterprise interaction with the external factors in the process of commercialization for most companies is called: «Opinion of the key customers». The mechanism is realized through the participation of the key customers in the assessment of ideas subject to the commercialization. The market reaction through the repeated verification of idea will guarantee the success of the suggested decision with regard to the existing alternatives.

Models of the innovative business partnership may be based on the following:

- combination of several well-known technologies with the brand new, revolutionary, created from scratch;
- proposition of the consumer products containing the modified elements;
- proposition of the consumer goods made of the new materials or in a new form;
- combined traditional production technology and the newest production methods;
- formulation of tasks without the ready decisions, which will be revolutionary in the chosen scale of study;
- choice of possibilities of the utilization of public, national funds, funds of the educational institutions, international organizations and foundations, other social initiatives for the ideas realization in the spheres preferred for the social problems solution.

It leads to the realization of the consistent innovative decisions, representing the demand for innovations.

The innovative business-model of enterprise may also include the elaboration of the new needs which is currently a natural consequence of passing the non-standard initiatives.

The direct formation of the innovative partnership is closely connected with the regional peculiarity of the location of enterprises, institutions and organizations. Within the application the experience of the European Union to the formation of the innovative programs, according to the innovative possibilities development, three regions can be singled out.

It would be reasonable to single out the varieties of regions according to the innovative development directions:

1. Regions of the innovative export orientation.
2. Regions of the innovative import-dependent.

This feature will cover the possibilities of acquisition of innovations, knowledge and experience and resources for their realization from the inner and outer markets. Export-oriented regions are characterized by the high level of the innovative products competitiveness, application of their own resource possibilities in its creation, large-scale inner or interregional transfer of technologies, possibility of creating the revolutionary, breakthrough innovations according to the high level of the enterprises patent activity.

Import-dependent regions apply the externally acquired ideas, knowledge, intellectual property objects are ensured with the security documents, innovative activity is derivative, technologies transfer is aimed at the technologies import from abroad and implementation at the domestic market in the form of concluding the franchising agreements.

The new-formal innovative partnership will consider the possibility of delegating the liability from the educational institutions and academic sector to the scientific and production unions or other organizational forms of the innovative partnership accumulating all means for the realization of innovations commercialization and transfer of technologies of each element of the innovative process, including the business sector. We offer the creation of subsystem within the existing system rather than the formation of the transitional economic system. The following step of the partnership realization in the sphere of the realization and formation of innovations is the creation of third-generation universities which, due to the developed infrastructure, will manage the major part of commercialization in the aspect of research, analysis of possibilities and choice of customers for the innovations realization at the market.

One more aspect in the realization of innovative partnership is the concentration on the local creative partnership relations producing the innovative ideas for the satisfaction of the local needs. With the ideas outlining, the projects are elaborated within the meetings and workshops as to the selection of the innovation realization concept. It is also important to support this process at the later stage of the commercialization process of the newly created intellectual property objects.

Thematic analysis at the level of the local strategies of development is subject to the realization after the approval of common subjects to facilitate the sharing of experience, formation of the new development priorities after which the «innovations laboratories» for the creation of projects shall be arranged [10].

Modern forms of the innovative projects realization were complemented by the aspects of the explication of culture, technological policy, human resources management, creation of the scientific business boundaries and/or intellectual property management.

Commercialization of innovations shall be connected with the academic business activity and develop as a creative cooperation of scientific sphere, business, public initiatives and non-commercial sector.

Partnership between these sectors may lead not only to the appearance of the new ideas, which can be commercialized, but also to the perspective of creation of the added value for the businessmen and improvement of the efficiency of all interested parties of the innovative business.

To improve the efficiency of the innovative process arrangement the American pattern shall be chosen, which provides for the close cooperation of industrial economic systems and educational institutions, especially for the purpose of the fundamental researches support and their transfer for the production and further commercialization at the market. American experience also conditions the realization of the short-term regional innovative development programs to solve the local problems and for the realization of the short-term studies.

To obtain more accurate and generalized results on the potential market possibilities and technical and economic capacities of enterprise during arrangement of partnership relations for the realization of innovations, it would be reasonable to apply the «Blue Ocean» strategy. The chosen strategy is characteristic of the diagnostics of the appearance of new branches, new productions on the basis of the radical ideas [11].

This strategy is applied at the enterprises of the Eastern and Western Europe, is based on the following components of analysis:

1. Reconstruction of market boundaries: Analysis of the alternative spheres, strategic groups, consumption chain, tenders, emotional and functional factors and time perspective.
2. Defining the demand margins: analysis of the customer and potential customer database.
3. Concentration on the wide view of strategy rather than not on the numerical expression: Formation of the strategy basis and defining the directions of its realization.

4. Analysis of the strategy elements: cost, value and application.

Analysis of the alternative spheres needs the information on the competitiveness in the sphere, competitive advantages of the major rivals, possibility of replacing the production units within one sphere and possibility and necessity of creating a new market environment [12].

Margins of the demand do not limit the usual range of the customer database, they rather extend the consumer's perception of a new idea and possibility of offering the new products or services outside the major sphere.

Analysis of the functional and emotional factors conditions searching for the better correlation between the cost and functional possibilities of the new product and its perception by the potential consumers. Analysis of the strategic elements will be realized before studying of the marketing complex.

Effectiveness of the application of such strategy for studying the possibilities of the innovative partnership realization is based on the constant strategic orientation of its components which will make the functioning of both enterprises and universities temporally and spatially oriented.

One more effective direction of innovative partnership bases realization is the creation of spin-off companies (spin-off with the participation of parent company) and spin-out of its share). Such method of the innovative projects realization allows the inventors or creative group getting relatively high level of income and becomes increasingly widespread in the innovations commercialization practice.

The advantages of application of this method are based on the possibilities of the control over each stage of the innovation process granted to all representatives of organizations involved in the process may result in the idea specification, its better adaptation to the market environment conditions at the stage of market entrance and exit.

Cooperation between the innovative mediators, structural units of the enterprises — innovative creative centers and the educational institutions provides the perspectives for further ideas generation and application of the immovable property objects to receive the new patents and conclusion of license agreements.

**Conclusions.** Thus, at the final stage of the process connected with granting the license, all parties shall strive to extend the cooperation between the business and centers of academic research. The key element in the innovative process is the ability to protect the rights to the intellectual property. This defines the model of cooperation between the partners and the order of the innovation commercialization.

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