

**MEMORANDUM**

TO: Planning, Housing and Economic Development Committee

FROM: Justina J. Ferber  Legislative Analyst

SUBJECT: Department of Economic Development Marketing Plan  
Update on Biotech Tax Credit

**MARKETING**

The Planning, Housing and Economic Development (PHED) Committee requested a marketing plan for \$350,000 added to the marketing program in the Department of Economic Development's (DED) FY12 Operating Budget. DED Director Silverman presented a preliminary outline of a marketing plan to the Committee on July 25. The Committee agreed to the use of the marketing funds as described in the preliminary outline. This briefing by Mr. Silverman will provide a more detailed update on DED's plans for the marketing funds. DED materials are attached to this memo.

The DED marketing plan in brief:

- **web site** redesign and upgrades
- **user licenses and contracts** for data and analysis – EMSI, Data.com, BioGateway, MD DLLR
- **media plan** – radio, promotional video and “visits”, e-letter, advertising in selected SmartBriefs
- **tech transfer initiatives** – attendance at Tech Transfer Summit (NIH Maryland), State Science and Technology Institute Conference (Columbus, Ohio), World's Best Technology Conference (Arlington, Texas), Federal Laboratory Consortium National Conference (Pittsburgh, Pennsylvania) and Association of University Research Parks International membership; initiation of Montgomery County's 1<sup>st</sup> Annual Commercialize Conference and Tech Transfer Showcase at the Bethesda North Conference Center
- **tradeshows and missions** – MEDICA (Germany), Bio Europe (Netherlands), Hannover Messe (Germany), ILSI-Bio Med (Israel), BIODKOREA (Korea), MC Embassy Hosting Series, mission to Switzerland and UK, CoreNet Global Summit (Atlanta), JP Morgan 30<sup>th</sup> Annual Healthcare Conference (San Francisco), IT/CyberSecurity Conference (San Francisco), AFCEA West International Conference (San Diego)

**BIOTECH TAX CREDIT**

Council staff asked Mr. Silverman to provide an oral update on the amendments to the Biotech Tax Credit legislation and supplemental appropriation. When the Committee met with the Mr. Silverman in July, he advised that a supplemental appropriation and amendments to legislation for the Biotech Tax Credit would be submitted by the County Executive to the Council in September.

**Background**

Expedited Bill 5-10, Economic Development – Biotechnology Credit – County Supplement, enacted March 16, 2010, commits the County to supplement the state biotechnology investment incentive tax credit, allowed under Maryland Code, Tax-General Article §10-725. The County supplement, which is a direct subsidy rather than a tax credit, would be 50% of the state tax credit for an investment in a qualified Montgomery County biotechnology company.

<b>Attachments:</b> FY12 DED Marketing Fund Proposed Usage	©1
EMSI Sample Report #1	©10
EMSI Sample Report #2	©29
Data.com for Salesforce	©38
Screenshot of Biotech Gate	©39
Tech Transfer Summit North America 2011	©41

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## FY12 DED Marketing Fund (\$350,000) Proposed Usage

Submitted to PHED Committee 10/6/2011

DED's marketing program promotes the assets, advantages, and opportunities available within Montgomery County for domestic and international businesses. Promotional activities include media relations; event coordination; local, regional, national, international advertising; sales mission in trade shows; and development and dissemination of informational and sales materials including the Department's website. These efforts help to position the County in a highly competitive environment, and they set the stage for direct contact with prospects and their business attraction, expansion, and retention opportunities.

DED is proposing to use the bulk of \$350,000 additional marketing fund added to its FY12 base budget by the County Council to improve the structural capacity within the DED to enhance the overall marketing programs. DED will use part of the funding to resume sales missions at key strategic events—both domestic and international—to cultivate new prospects in the IT and Life Sciences industry sectors.

### **Proposed Use (a few proposed items have been committed due to timing issues):**

#### **Web Design and Development: Total costs \$80,000**

Description	Costs	Status
<p><b><u>Phase I of the department's Web site redesign</u></b>                      The project began in late August and is scheduled for launch at the end of the 2011 calendar year. Enhancements for phase I are designed to: 1) improve navigation; 2) provide easier and more logical access to information for visitors; and, 3) guide the department's three main target audiences (site selection consultants, existing businesses and potential start-ups) to the specific information they need to find. The new site will accomplish these goals in the following way:</p> <ul style="list-style-type: none"> <li>▷ The Web site will be authored using prevailing CSS standards and will be compatible with a wide range of commonly used Web browsers and mobile access on a variety of platforms, including (but not limited to) smart phones, iPads and other mobile tablets.</li> <li>▷ The site-improved navigation will be accomplished through interactive mouse-over functionality, and specifically, a dropdown menu bar.</li> <li>▷ The design will be flexible, allowing the addition of new services and pages, including a blog and RSS feed; distance learning tools such as Webcasting, podcasting and video-streaming; the integration of social networking tools, including (but not limited to) Facebook, Twitter and LinkedIn; and a live calendar of departmental and partner events that will allow user accounts and updating by designated partner personnel.</li> <li>▷ The new site will include a content management system specific to it, allowing the department's staff to easily maintain the site.</li> </ul>	Paid from DED regular marketing budget (\$30,000).	Underway and on target.

<ul style="list-style-type: none"> <li>▷ New content will also be automated and dynamically created (i.e. with news feeds) wherever possible.</li> <li>▷ The new site will include third party applets, including Google Analytics, Google Translate, Google Maps (in particular in assisting site visitors with directions to the department's office) and allow the easy integration by DED Web staff of such tools on an ongoing basis.</li> </ul>		
<p><b><u>Phase II upgrades</u></b>  The project will build upon enhancements produced by Phase I redesign, providing increased user interactivity. The major enhancements will include:</p> <ul style="list-style-type: none"> <li>▷ SQL databases to provide customized information to visitors to the Web site <ul style="list-style-type: none"> <li>• Property database, allowing visitors to enter search criteria and get in return a list of matching properties with locations plotted on a map. <ol style="list-style-type: none"> <li>1. Real estate professionals will have login capabilities to maintain an accurate and up-to-date list of properties in the county</li> <li>2. Visitors will customize their search and resulting reports by key word fields and drop-down lists, using CSS technology</li> </ol> </li> <li>• Procurement database will connect contractors with procurement opportunities both with the county and with partner businesses in the county <ol style="list-style-type: none"> <li>1. Login capabilities will allow both vendors and contractors to exchange information on pending contracting opportunities</li> <li>2. Visitors will customize their search and resulting reports by key word fields and drop-down lists, using CSS technology much like the properties database, but with greater matching abilities</li> </ol> </li> </ul> </li> <li>▷ Integration of Tech Transfer micro-site into the DED Web site, along with CMS capabilities for site contributors.</li> <li>▷ Integration of Workforce Services Web site information into DED Web site, either in place of MontgomeryWorks.com or in concert with it.</li> <li>▷ Ability for visitors to create customizable and printable reports with information of their choice (demographics, climate information, schools, etc.)</li> <li>▷ Enhanced integration of social networking opportunities on Facebook, Twitter, Google+ and new technologies that have yet to be released.</li> </ul>	<p>\$80,000</p>	<p>DED is developing the Scope and Requirements of Phase II contract.</p>

**Acquisition of Analytic Tools/Databases: Total costs \$50,000**

Description	Costs	Status
<p><b><u>EMSI (Economic Modeling Specialists, Inc.) Analyst</u></b></p> <p>Analyst is a web-based tool that gathers and displays in-depth, local employment data and analysis. Analyst gives easy access to comprehensive and up-to-date labor market data and provides a great starting point for making clear, data-driven decisions. With a mixture of industry/occupation data, impact assessments, and economic base analyses, DED will be better equipped to target high-impact businesses for recruitment and retention and identify the County's most competitive and basic industries so we can maximize the return on investment of retention and expansion efforts.</p> <p><b>Analyst helps DED:</b></p> <ul style="list-style-type: none"> <li>• <b>Find the data when needed</b></li> <li>• <b>Get the most recent data</b> — data in Analyst is updated four times a year.</li> <li>• <b>Conduct straightforward analysis</b> — Produce our own analysis using current and complete industry, occupation, and demographic data.</li> <li>• <b>Better understand local education and training</b> — Link local training programs to occupations and industries to see which programs are in high-demand and what is needed to strengthen our region's workforce.</li> <li>• <b>Explore skills and conduct re-employment scenarios</b> — Quickly and easily understand the knowledge, skills, and abilities of local workers and match their compatibility with other regional job opportunities to see what retraining might be needed.</li> <li>• <b>Perform input-output analysis</b> — Better understand the impact of an industry's expansion or contraction in our region, or simulate the effects that the event will have on other industries.</li> <li>• <b>Produce maps and compare regions</b> — See how our region stacks up against others, learn what factors make other regions more competitive, and see what industries drive our region.</li> </ul> <p>EMSI allows comparisons with several other similar areas.</p>	<p>\$15,000/yr for 10 user licenses</p>	<p>Acquired</p>
<p><b><u>Data.Com</u></b></p> <p>This database (merger of D &amp; B and JigSaw) is an addition to Salesforce (The CRM that DED uses to manage prospects and contacts) has the ability to scrub, update and locate new contacts and leads and supplement existing contact information in Salesforce. Environmental Protection and Fire &amp; Rescue have expressed an interest in accessing company contact information and may be willing to partner and share the cost.</p>	<p>\$30,000 (less depending on DEP and F&amp;R cost sharing)</p>	<p>Vendor is preparing contract.</p>

<p><b><u>BioGateway—by Venture Valuation</u></b>  The database for Maryland is part of the Global Company database, Biotechgate, with more than 21,000 company profiles. Biotechgate comprise of global databases from many countries such as Canada, France, Germany, India, Italy, Scandinavia, UK, and US. Each company has detailed profiles with categorization, indication, financing rounds, products in the pipeline and more.  This web-based database will be an essential tool in monitoring the biotechnology industry in the County/State, and other pertinent and prominent biotech centers of the globe for trend/need analysis, and business matchmaking and prospect identification.</p>	<p>\$5,000 for 10 user licenses</p>	<p>Contract needs to be renewed.</p>
<p><b><u>Data Import from MD DLLR</u></b>  DED has entered into a data sharing agreement with the State DLLR and receives a quarterly raw data set of over 38,000 records. Without an automated database that compares the dataset with previous quarters, it is impossible to manually track, compare, and analyze the data sets.  The consulting contract will enable the Salesforce that DED uses to import and filter the records sent from the DLLR.</p>	<p>\$5,000</p>	<p>Contract underway</p>

**Media Plan: Total costs \$120,000**

Description	Costs	Status
<p><b><u>Targeted 8 to 16 week radio advertising campaign</u></b>  (i.e., WTOP) featuring local CEOs and/or to promote LSBRP, Workforce Services Programs – est.</p>	<p>Mon-Sun:  \$6,000 -  12,000 per  week  (\$48,000)</p>	<p>Planning stage</p>
<p><b><u>Production of a targeted County/DED promotional video</u></b>  To offer multiple time lengths/uses, i.e. on DED website, other on-line ad buys, Facebook, on flash drives for giveaways at conferences/events, on video monitors at county conference center, etc.</p>	<p>\$20,000</p>	<p>Planning stage</p>
<p><b><u>Targeted local “media exposure visits”</u></b>  With the County business representatives to selected U.S. cities to coincide with County/State/private-sector industry-related tradeshows (i.e. – coordinate appearance on local morning TV/Radio news for a County business rep. attending a conference in that city; example - AFCEA West International Conference, Jan. 2012, San Diego or AvaMed, Sept. 2012, Boston)</p>	<p>\$1,500 -  \$2,000 per US  trip. Ten trips  proposed for  \$20,000.</p>	<p>Planning stage</p>

<p><b><u>County/DED-produced SmartBrief</u></b>  E-letter sent to C-level readers in targeted industry sectors; could incorporate press releases/news items from local businesses – est. cost – SmartBriefs are advertiser supported so no cost to County/DED; SmartBrief works with us initially to bring on potential advertisers and then handles maintaining/getting new advertisers from then on.</p>	<p>\$2,000 for MailerMailer annual service fees</p>	<p>Planning stage</p>
<p><b><u>County/DED advertising in selected SmartBriefs</u></b>  DED will choose by publication, industry, company metrics, and professional demographics. Ads range from “leaderboard banner ads” to “section sponsorships” to “text ads”– est. cost averages anywhere from \$650/issue to \$1,850/issue depending on the industry/SmartBrief issue and most have a min. buy of 10 issues/up to 80 issues so the cost varies significantly based on the ad buy.</p>	<p>\$30,000</p>	<p>Planning stage</p>

**Tech Transfer Initiatives: Total costs \$27,500**

Date/Location	Description	Costs
<p>NIH, Maryland  October 3-4, 2011</p>	<p><u>Tech Transfer Summit (Co-Sponsor)</u>  2<sup>nd</sup> Tech Transfer event hosted by the NIH, a very unique and productive platform for discussion, partnering and licensing between industry and research. The County, the MD BioCenter, and the State were key sponsors.  Outcome Measures:</p> <ul style="list-style-type: none"> <li>• Networking opportunity to develop best practices for County Tech Transfer program</li> <li>• Creation of new matrices for commercialization success</li> </ul>	<p>\$5,000</p>
<p>Columbus, OH,  November 8-9, 2011</p>	<p><u>State Science and Technology Institute (SSTI) Annual Conference</u>  Benefits:</p> <ul style="list-style-type: none"> <li>• Opportunity for TBED practitioners and policy makers to further their professional development and apply best practices through: successful approaches to building tech-based economies, information about new and existing federal programs, and a better understanding of trends in tech-based economic development.</li> </ul> <p>Outcome Measures:</p> <ul style="list-style-type: none"> <li>• Networking opportunity to develop best practices for County Tech Transfer program</li> <li>• Creation of new matrices for commercialization success</li> <li>• Development of new communication vehicle for businesses to identify technologies of interest to federal or academic arena</li> </ul>	<p>\$1,500/staff</p>

<p>Arlington, TX, March 2012</p>	<p><u>World's Best Technology Conference</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• The nation's most active early and seed stage investors, corporate licensing scouts, angels, university tech transfer pros, licensing experts, and federal agency dealmakers participate</li> <li>• Targeted industries: cleantech, nano, information technology, physical science and life science technologies.</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Track Montgomery County firms in attendance for: investment obtained; capitalization enhancement over 3-year period; investors in attendance interest level in other Montgomery County firms over subsequent 3-year period</li> <li>• Identify new sources of funding for early-stage companies, particularly focused on tech transfer opportunities</li> </ul>	<p>\$2,500/staff</p>
<p>Pittsburgh, PA April 30-May 3, 2012</p>	<p><u>Federal Laboratory Consortium National Conference 2012</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• Continuity of relationship, established since 2004, with national membership organization of federal laboratory technology transfer officers.</li> <li>• Pursue national recognition of Montgomery County tech transfer efforts and provide the vision for County based organizations to secure a pathway to commercializing their technologies.</li> <li>• Continue partnership and visibility as an economic development force, not only with Montgomery County based federal laboratory ORTAs, but also to nurture new relationships with national labs.</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Gain strategic insight of new Federal programs, tech transfer tools and techniques, and research and development opportunities available for dissemination to Montgomery County business and/or partner organization</li> </ul>	<p>\$1,500/staff</p>
<p>Bethesda North Marriott Conference Center Fall 2012</p>	<p><u>1<sup>st</sup> Annual Commercialize Conference and Tech Transfer Showcase</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• Assemble federal lab tech transfer officers to participate in one-day conference through Federal Laboratory Consortium</li> <li>• Attract VC companies interested in investing in technology firms and identifying partnerships</li> <li>• Develop an annual conference compatible to World's Best Technologies and Small Business Innovation Research Conference for Greater Washington area.</li> <li>• Federal Labs are unable to conduct their own meeting(s) in</li> </ul>	<p>\$15,000 in Sponsorship, planning underway</p>

	<p>Montgomery County 1) because of per diem rates; 2) proximity to their own labs (under 50 miles). County initiation of such a conference is necessary in order to enable our own labs to hold a conference here. Have been pursuing this effort with the help of CVB for almost 3 years.</p> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Matchmaking sessions with federal laboratory scientists will be measured over a 3-year period to determine if intellectual property is licensed or obtained</li> <li>• Investments will be tracked over 3-year period to determine if initial fund was leveraged by additionally monies</li> <li>• Companies obtaining investment will be tracked and assisted to capitalize on County's incubator facilities.</li> </ul>	
	<p><u>Association of University Research Parks (AURP) International Membership</u></p> <p>Benefits</p> <ul style="list-style-type: none"> <li>• Access to premier partner events, professional development and resources.</li> <li>• Address questions about research parks; as a member, pose a question to AURP's extensive network of innovation professionals.</li> <li>• Recognition for County innovation centers or Welcome Center program on AURP website. Awards of Excellence are presented annually at the International Conference. Members can nominate the park, tenants or individual's achievements for these awards.</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Publicizing County tech transfer programming and innovation center on global scale.</li> </ul>	<p>\$2,000 sustained associate membership</p>

**International Tradeshows/Missions: Total costs \$33,000**

Date/Location	Description	Costs
Germany, November 16-19, 2011	<p><u>Medica</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• MEDICA is the center of attraction for all those involved in the health care industry.</li> <li>• Around 138,000 visitors from well over 100 countries are expected to attend this annual event.</li> <li>• MEDICA regularly features around 4,400 exhibitors from around the world displaying their OEM products and services.</li> <li>• The County will partner with MDBio Center and DBED to market the region and identify prospects.</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Foreign Direct Investment Attraction</li> </ul>	<p>\$4,000/staff</p>

<p>Amsterdam, Netherlands March 19-21</p>	<p><u>Bio Europe</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• The second largest life sciences partnering conference - with 1800 participants including: CEOs, business developers, investors and scientists from 40 countries.</li> <li>• 1800 participants from 40 countries</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Foreign Direct Investment Attraction</li> </ul>	<p>\$5,000/staff</p>
<p>Switzerland and UK March 21-27</p>	<p><u>Targeted DED Call Mission to Companies in Switzerland &amp; UK</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• DED Staff attending BIO - Europe would continue on, to Switzerland and the UK for B2B meetings.</li> <li>• Targeted visit to DED's top 6 Swiss/UK prospects</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Foreign Direct Investment Attraction</li> </ul>	<p>\$5,000/staff</p>
<p>Hannover, Germany April 23-27</p>	<p><u>Hannover Messe 2012</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• Will be led by the U.S. Department of Commerce's Economic Development Administration and by Invest in America. (Aaron Brickman suggested that DED participate). This opportunity is unique -- in that it has both a trade and a FDI component. Participating U.S. jurisdictions will be given the opportunity to promote their regions.</li> <li>• 6500 businesses from 65 countries</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Foreign Direct Investment Attraction</li> </ul>	<p>\$4,000/staff</p>
<p>Tel Aviv, Israel May 2012 (exact date TBD)</p>	<p><u>ILSI-Bio Med</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• Israel's top bio show -- attended by top Israeli biotech companies.</li> <li>• 6,000 attendees from 42 countries; over 2,500 one-on-one meetings</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Foreign Direct Investment Attraction</li> </ul>	<p>\$5,000/staff</p>
<p>Korea September, 2012</p>	<p><u>BIOKOREA</u></p> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• 250 Korean companies seeking North American operations.</li> <li>• Proven annual BIO event where the County has successfully attracted 6 companies. The State of Maryland (DBED) will participate &amp; exhibit; DED will partner with them.</li> </ul> <p>Outcome Measure:</p> <ul style="list-style-type: none"> <li>• Foreign Direct Investment Attraction</li> </ul>	<p>\$4,000/staff</p>

Montgomery County, MD Ongoing	<u>Embassy Hosting Series</u>  Benefits: <ul style="list-style-type: none"> <li>• DED will host commercial and scientific attachés of select foreign embassies for tours and presentations on MoCo's assets.</li> <li>• Relationship building with key embassies that represent markets that are of interest to DED. Ultimately, FDI will result.</li> </ul> Outcome Measure: <ul style="list-style-type: none"> <li>• Develop broader base of embassy contacts</li> </ul>	\$3,000
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**Domestic Tradeshows/Missions: Total costs \$ 14,200**

Date/Location	Description	Costs
Atlanta, Georgia November 5-8, 2011	<u>CoreNet Global Summit</u> This is the world's leading association of corporate real estate professionals. Nearly 7,000 members, who include 70% of the Fortune 100 and nearly half of the Forbes Global 2000, meet to develop networks, share knowledge, and search for opportunities.	\$3,000/staff
San Francisco January 9-11, 2012	<u>JP Morgan 30th Annual Healthcare Conference</u> This annual conference, which in recent years has become the "must go-to" healthcare meeting, offers something for just about everyone's appetite. And, for those interested in earlier stage private companies, there is a rich menu to choose from.	\$1,800/staff (two staff for \$3,600)
San Francisco February 27 thru March 2, 2012	<u>IT/CyberSecurity Conference</u> RSA Security is the most comprehensive forum in information security. This is the Conference that Mark Hogan, the CEO of the GSS (Federal IT consulting company) that relocated from the Fairfax County in 2010, connected with and attracted more than 20 federal contractors to Fairfax from 2008-2010.	\$2,000 (two staff for \$4,000)
San Diego January 24-26, 2012	<u>AFCEA West International Conference</u> Co-sponsored by AFCEA International and the U.S. Naval Institute, West 2011 is the largest event on the West Coast for communications, electronics, intelligence, information systems, imaging, military weapon systems, aviation, shipbuilding, and more. There were 11,909 attendees in 2011 which included military personnel, industry, academia and press.	\$1,800/staff (two staff for \$3,600)

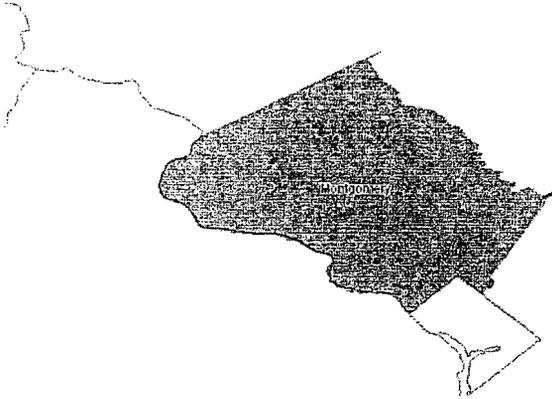
**Proposed Use Total: \$324,700.**

\$25,000 will be reserved for opportunities yet to be identified.

# Montgomery County Department of Economic Development

111 Rockville Pike, Ste. 800  
Rockville, Maryland 20850

## Industry Report



## Region Info

Region: Montgomery County

County Areas: Montgomery, Maryland (24031)

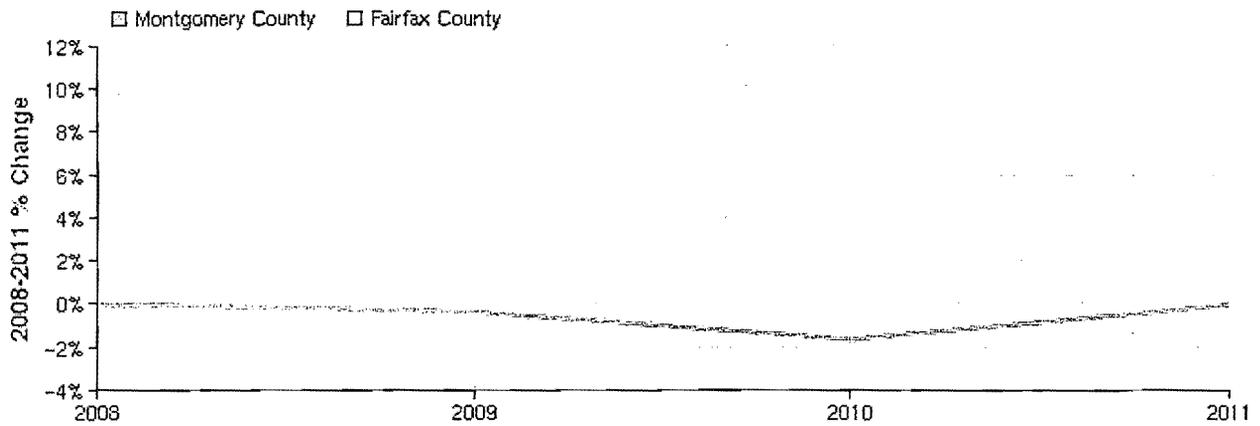
Region: Fairfax County

County Areas: Fairfax, Virginia (51059)

## Selected Industries

NAICS Code	Description
5417	Scientific Research and Development Services

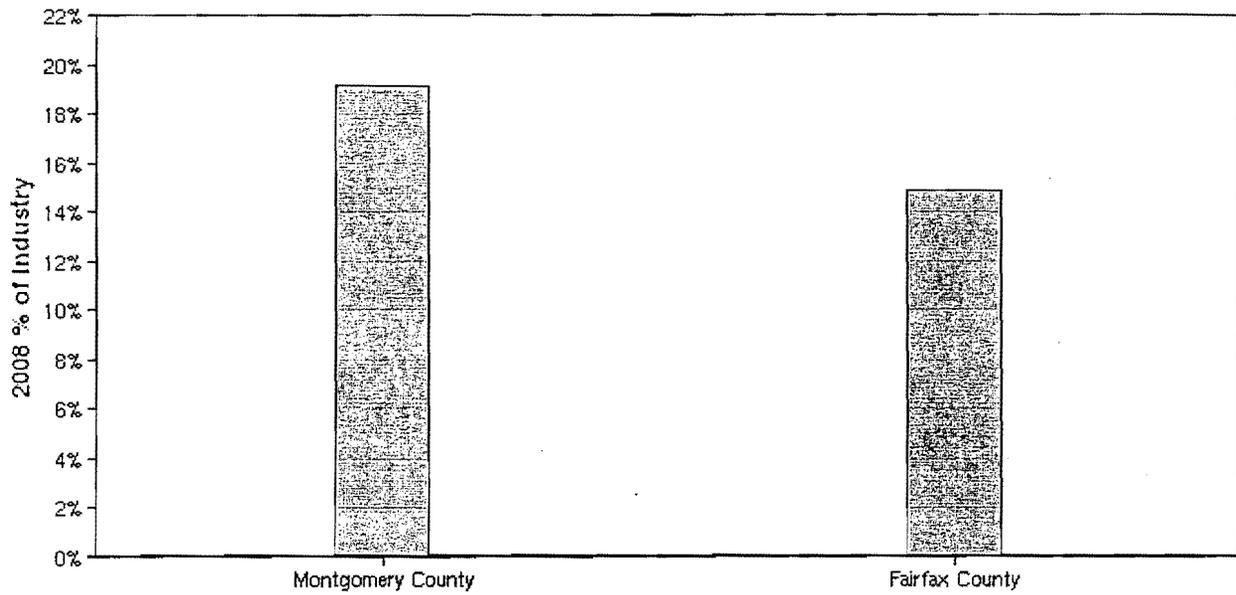
## Industry Change Summary



Region	2008 Jobs	2011 Jobs	Change	% Change	2011 Average Earnings
Montgomery County	14,179	14,173	-6	0%	\$105,424
Fairfax County	10,030	11,014	984	10%	\$127,943

Source: EMSI Complete Employment - 2011.3

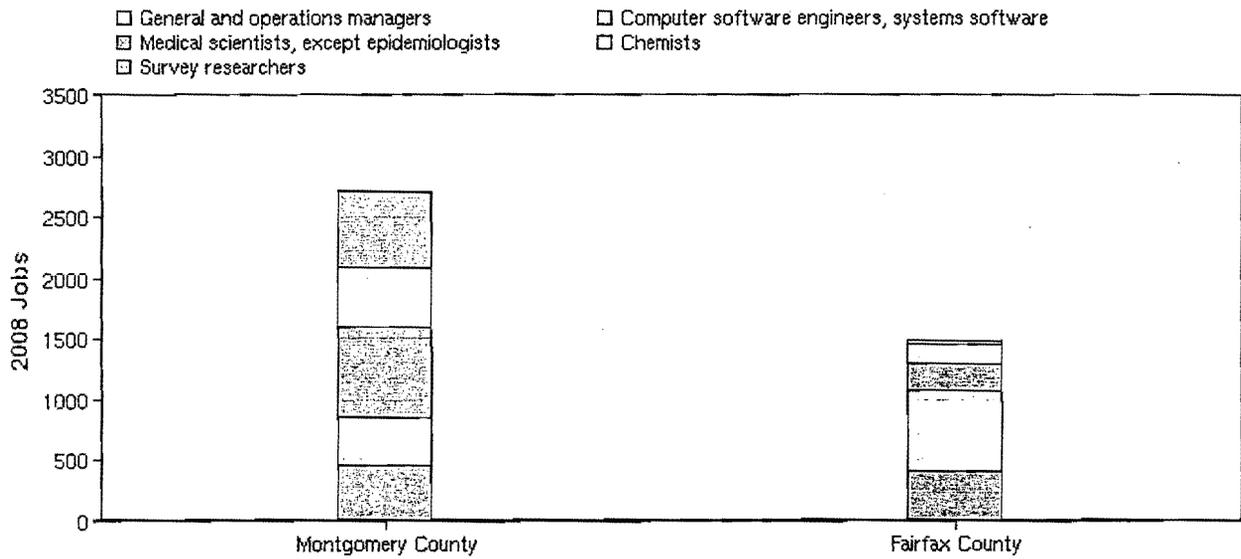
## Top Occupations - 2008 % of Industry



SOC Code	Description	Montgomery County	Fairfax County
19-1042	Medical scientists, except epidemiologists	5%	2%
19-3022	Survey researchers	4%	0%
19-2031	Chemists	3%	2%
11-1021	General and operations managers	3%	4%
15-1032	Computer software engineers, systems software	3%	7%
Total		19%	15%

Source: EMSI Complete Employment - 2011.3

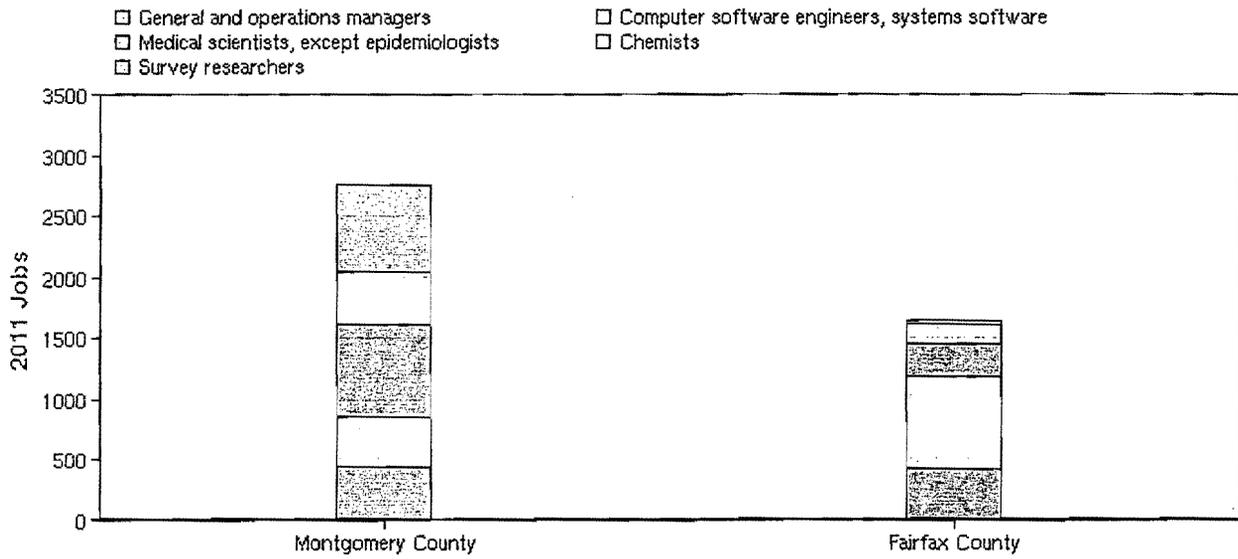
# Top Occupations - 2008 Jobs



SOC Code	Description	Montgomery County	Fairfax County
19-1042	Medical scientists, except epidemiologists	743	229
19-3022	Survey researchers	629	29
19-2031	Chemists	479	155
11-1021	General and operations managers	452	407
15-1032	Computer software engineers, systems software	409	667
	<b>Total</b>	<b>2,712</b>	<b>1,488</b>

Source: EMSI Complete Employment - 2011.3

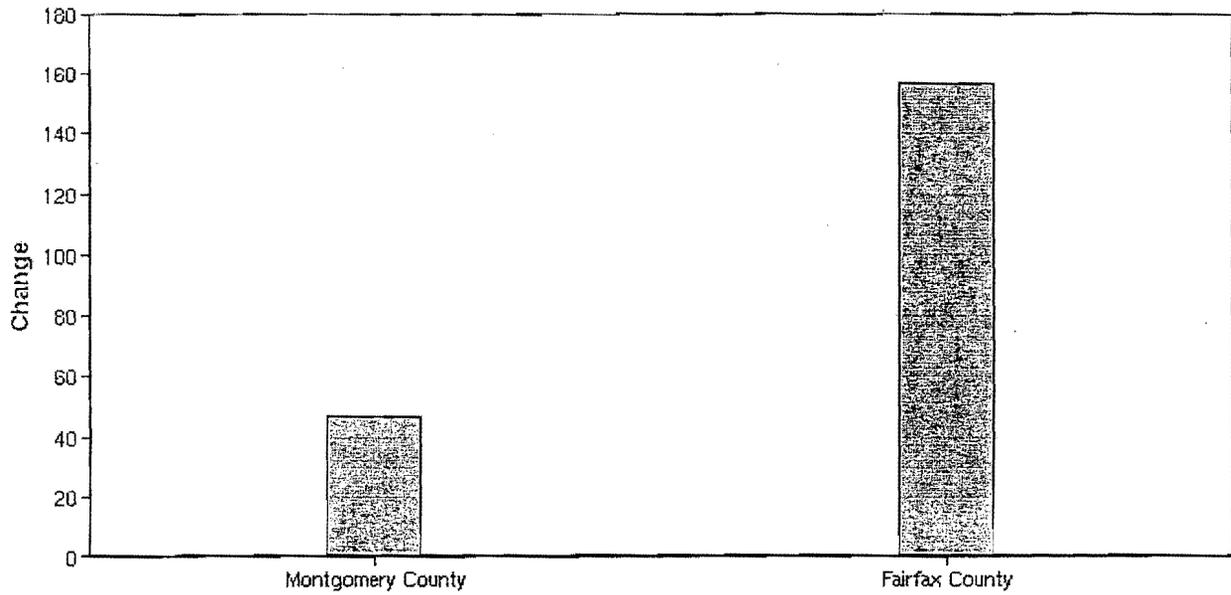
# Top Occupations - 2011 Jobs



SOC Code	Description	Montgomery County	Fairfax County
19-1042	Medical scientists, except epidemiologists	764	263
19-3022	Survey researchers	709	33
11-1021	General and operations managers	439	433
19-2031	Chemists	437	161
15-1032	Computer software engineers, systems software	410	754
	<b>Total</b>	<b>2,759</b>	<b>1,644</b>

Source: EMSI Complete Employment - 2011.3

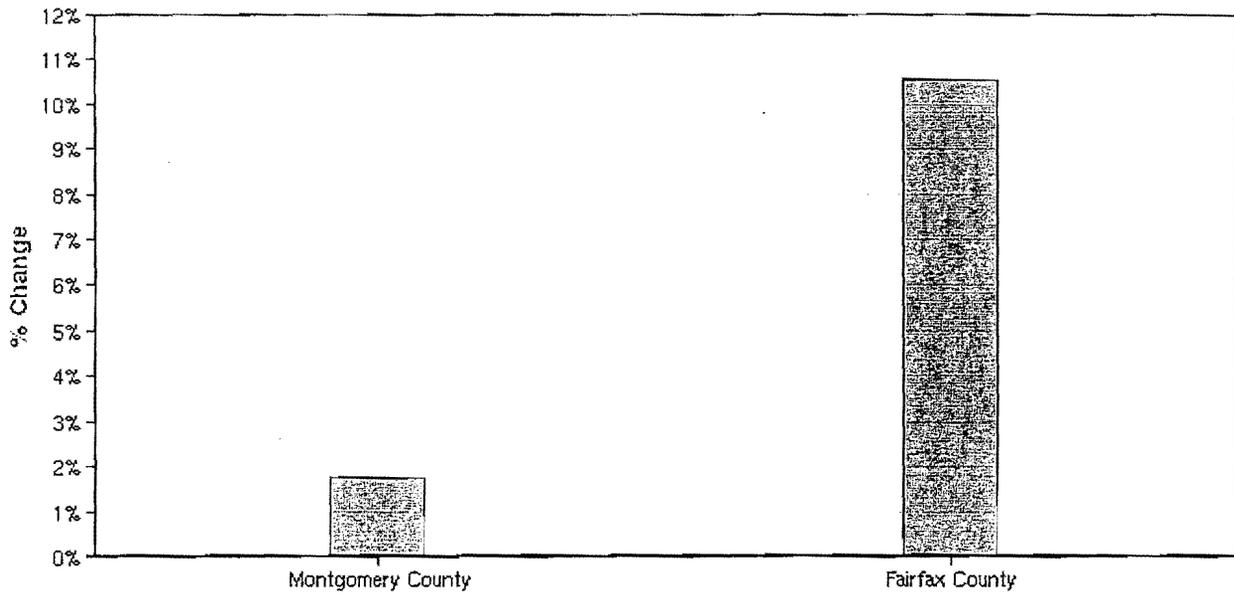
## Top Occupations - Change



SOC Code	Description	Montgomery County	Fairfax County
19-3022	Survey researchers	80	4
19-1042	Medical scientists, except epidemiologists	21	34
15-1032	Computer software engineers, systems software	1	87
11-1021	General and operations managers	-13	26
19-2031	Chemists	-42	6
	<b>Total</b>	<b>47</b>	<b>156</b>

Source: EMSI Complete Employment - 2011.3

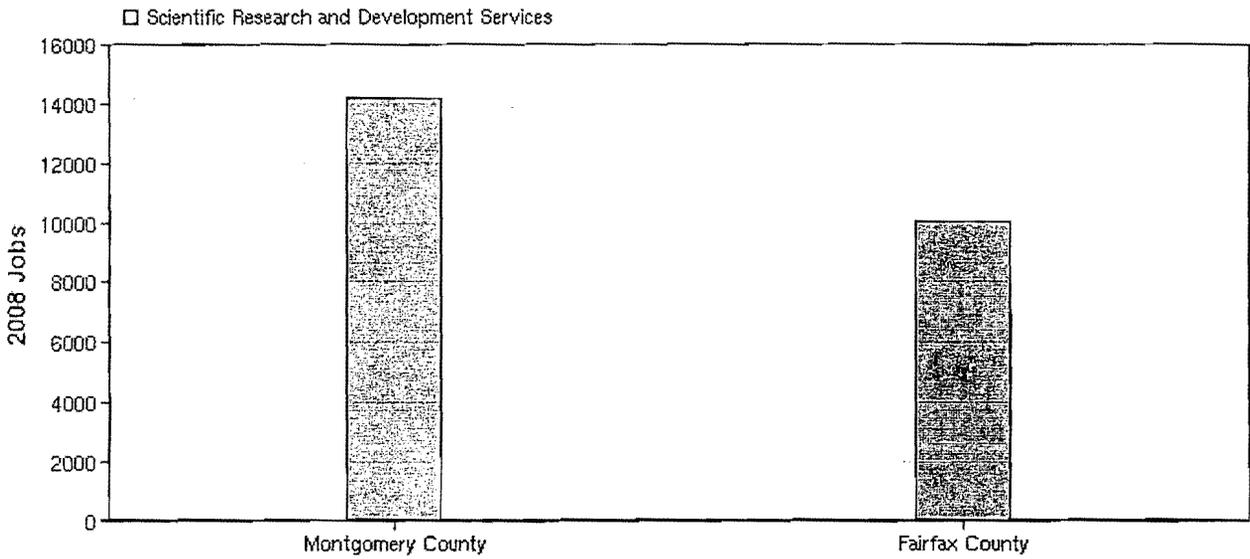
## Top Occupations - % Change



SOC Code	Description	Montgomery County	Fairfax County
19-3022	Survey researchers	13%	14%
19-1042	Medical scientists, except epidemiologists	3%	15%
15-1032	Computer software engineers, systems software	0%	13%
11-1021	General and operations managers	-3%	6%
19-2031	Chemists	-9%	4%
	<b>Total</b>	<b>2%</b>	<b>10%</b>

Source: EMSI Complete Employment - 2011.3

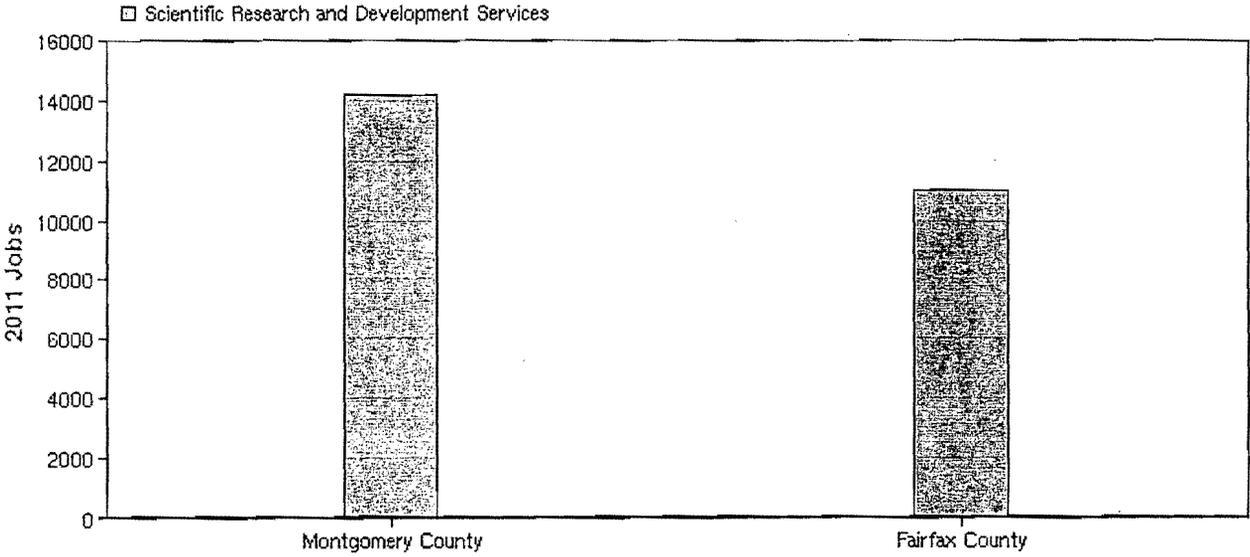
# Industry Breakdown - 2008 Jobs



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	14,179	10,030
	Total	14,179	10,030

Source: EMSI Complete Employment - 2011.3

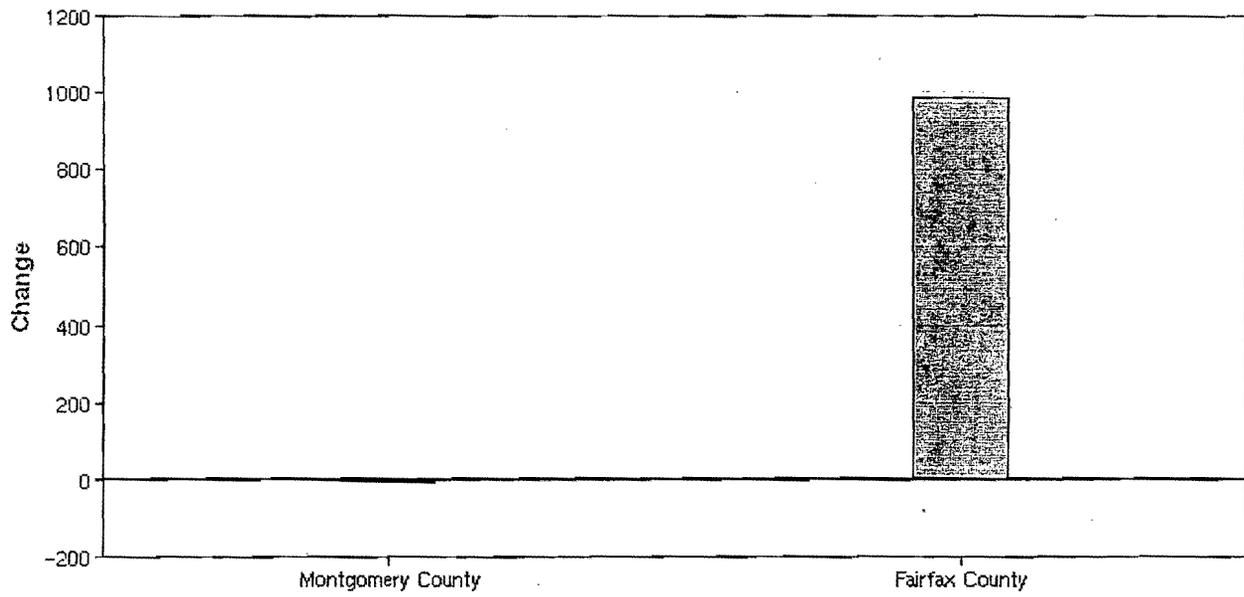
Industry Breakdown - 2011 Jobs



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	14,173	11,014
	Total	14,173	11,014

Source: EMSI Complete Employment - 2011.3

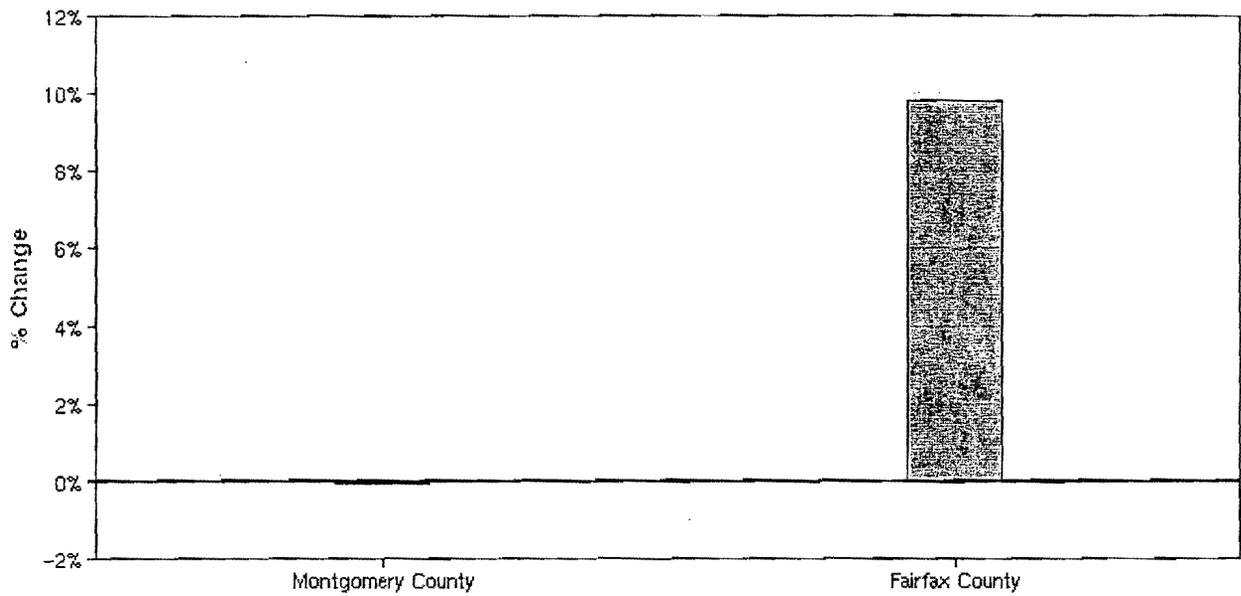
# Industry Breakdown - Change



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	-6	984
	Total	-6	984

Source: EMSI Complete Employment - 2011.3

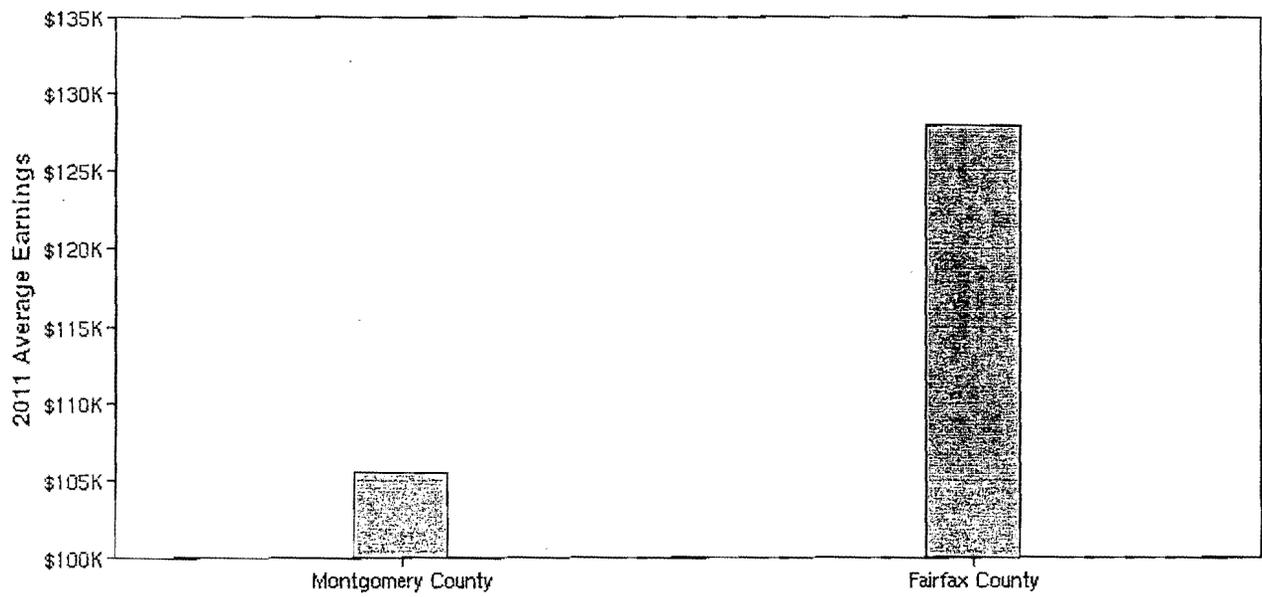
# Industry Breakdown - % Change



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	0%	10%
	Total	0%	10%

Source: EMSI Complete Employment - 2011.3

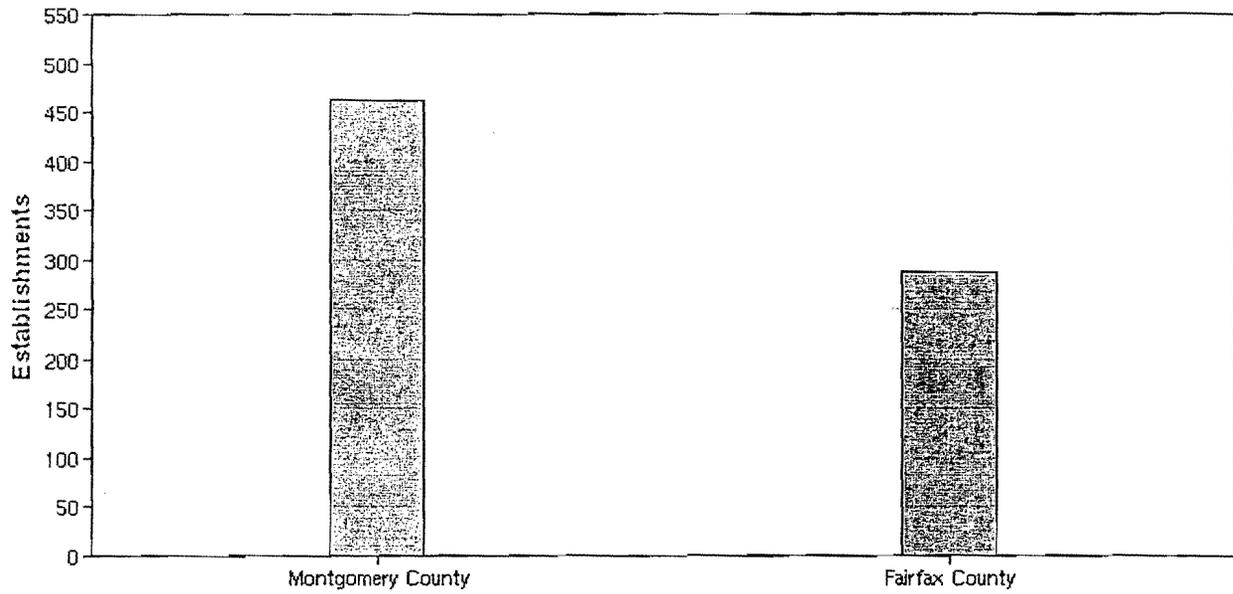
# Industry Breakdown - 2011 Average Earnings



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	\$105,424	\$127,943
	<b>Total</b>	<b>\$105,424</b>	<b>\$127,943</b>

Source: EMSI Complete Employment - 2011.3

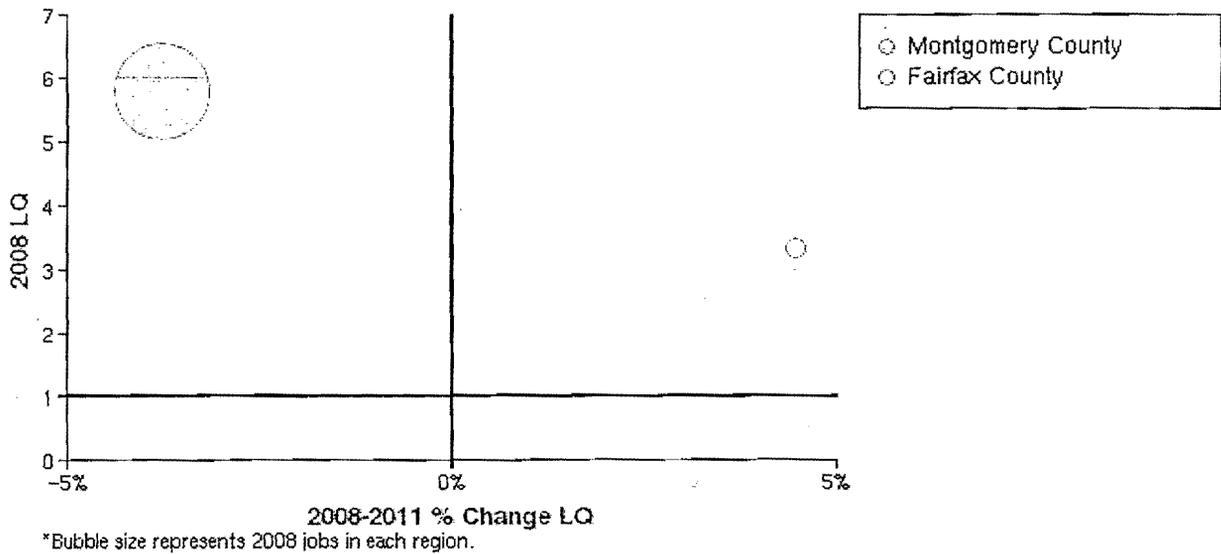
# Industry Breakdown - Establishments



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	463	287
	Total	463	287

Source: EMSI Complete Employment - 2011.3

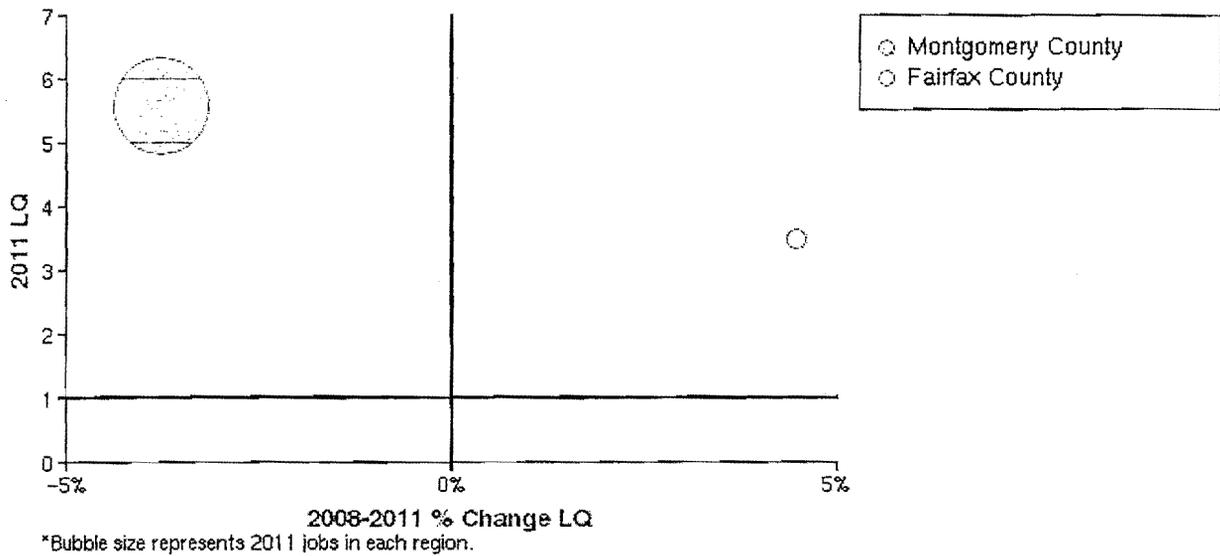
# Location Quotient Breakdown - 2008 LQ



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	5.78	3.33
	Total	5.78	3.33

Source: EMSI Complete Employment - 2011.3

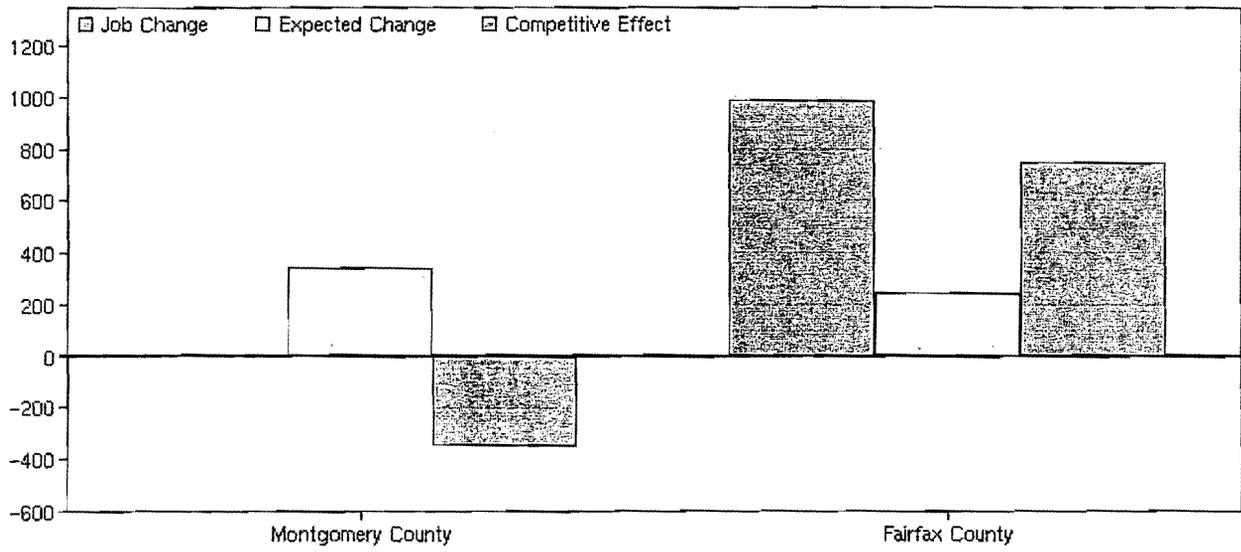
# Location Quotient Breakdown - 2011 LQ



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	5.56	3.48
	Total	5.56	3.48

Source: EMSI Complete Employment - 2011.3

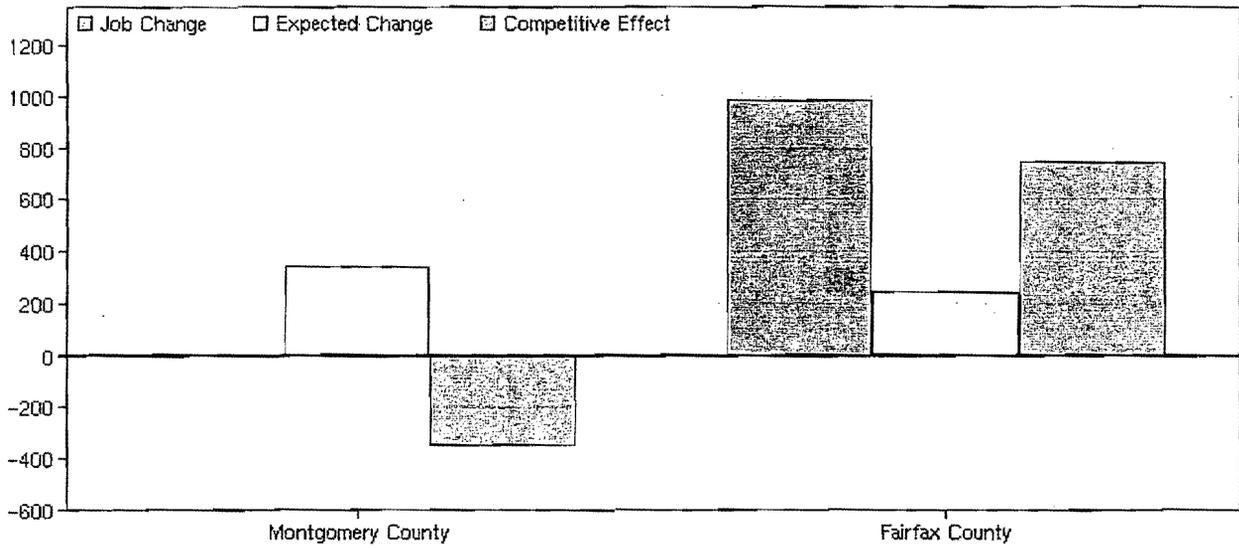
# Shift Share Breakdown - Job Change



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	-6	984
	Total	-6	984

Source: EMSI Complete Employment - 2011.3

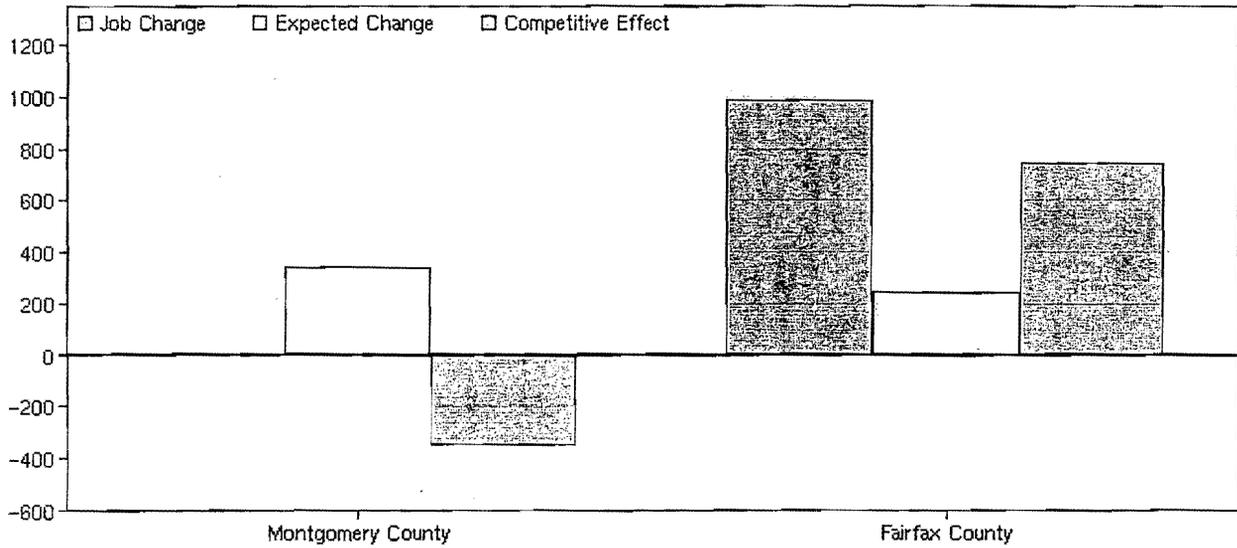
# Shift Share Breakdown - Expected Change



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	340	240
	Total	340	240

Source: EMSI Complete Employment - 2011.3

# Shift Share Breakdown - Competitive Effect



NAICS Code	Description	Montgomery County	Fairfax County
5417	Scientific Research and Development Services	-346	744
	Total	-346	744

Source: EMSI Complete Employment - 2011.3

## Data Sources and Calculations

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### Occupation Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. EMSI's occupation data are based on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one from the U.S. Department of Education, with customizations by EMSI.

### Industry Data

In order to capture a complete picture of industry employment, EMSI basically combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data, 15-year past local trends in each industry, growth rates in statewide and (where available) sub-state area industry projections published by individual state agencies, and (in part) growth rates in national projections from the Bureau of Labor Statistics.

### Location Quotient

Location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region unique in comparison to the national average.

### Shift Share

Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors.

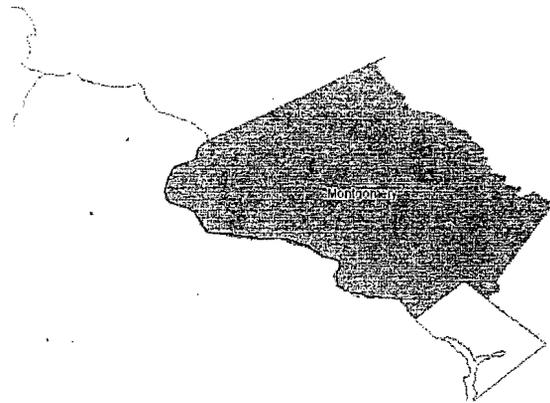
### State Data Sources

This report uses state data from the following agencies: Maryland Department of Labor, Licensing and Regulation, Office of Labor Market Analysis and Information.

# Montgomery County Department of Economic Development

111 Rockville Pike, Ste. 800  
Rockville, Maryland 20850

## All Reports



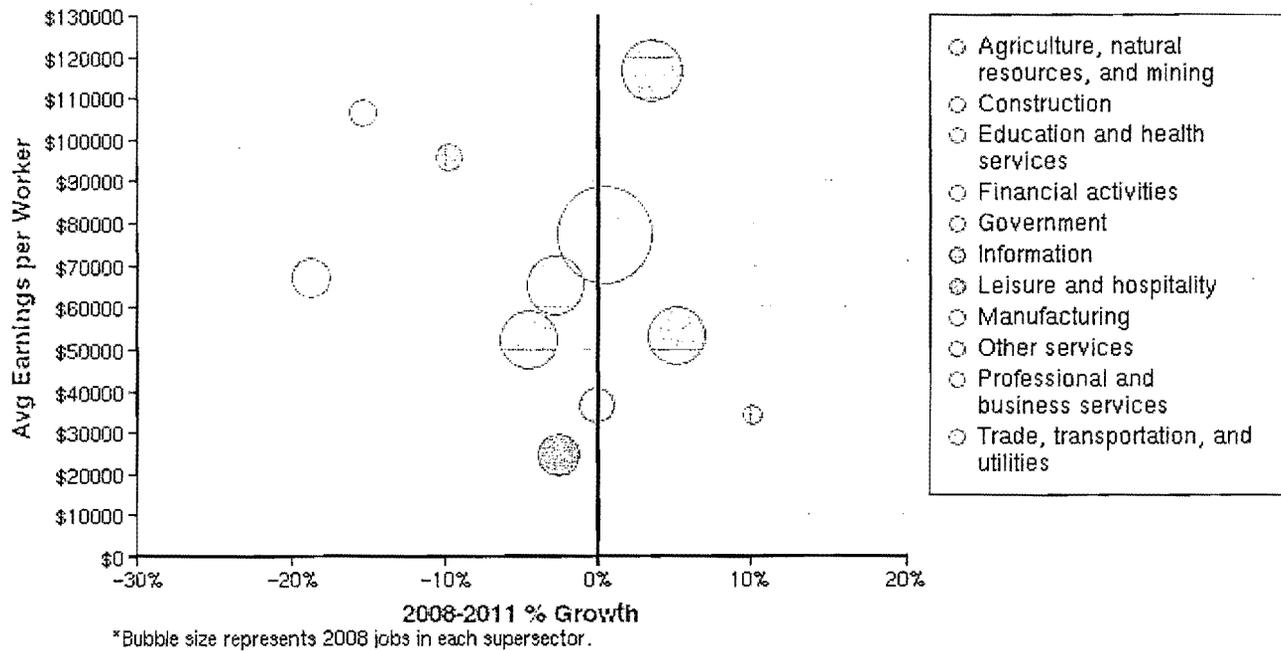
## Region Info

Region: Montgomery County

County Areas: Montgomery, Maryland (24031)

## Industry Size and Growth

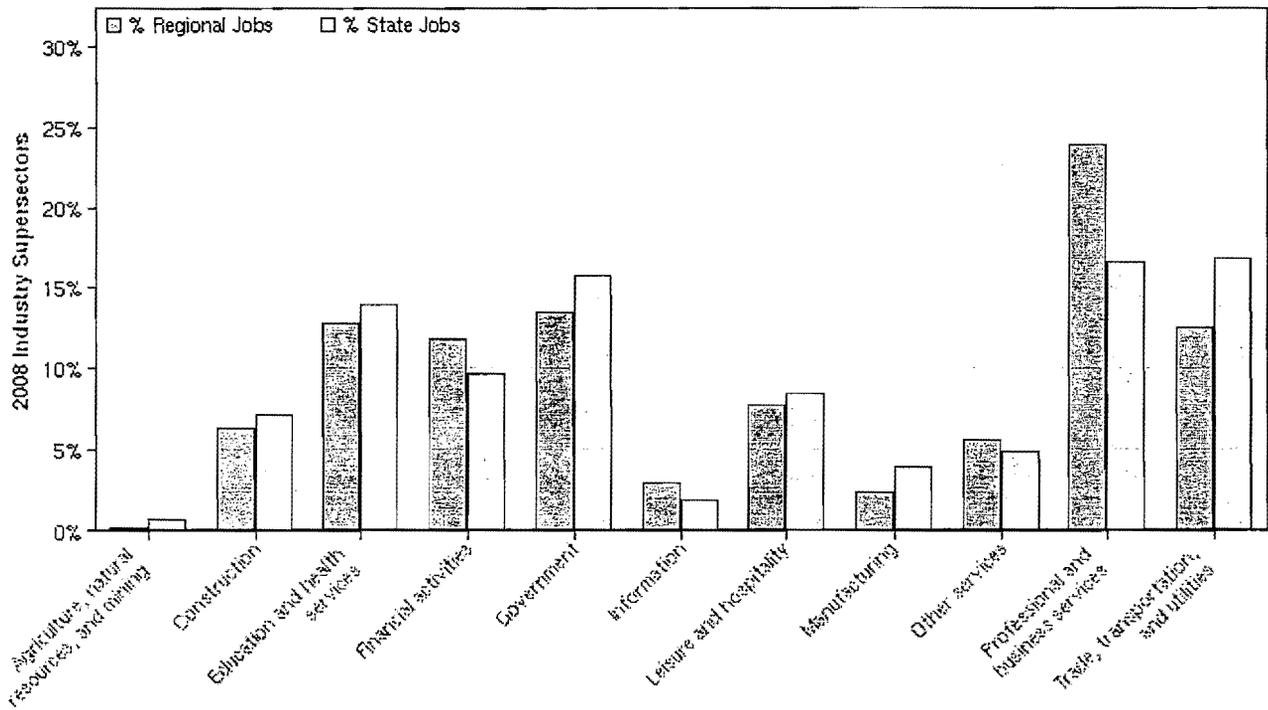
### 2008 - 2011 Size and Growth



Description	2008 Jobs	2011 Jobs	Growth	% Growth	2011 EPW
Agriculture, natural resources, and mining	1,740	1,915	175	10%	\$34,288
Construction	41,009	33,312	-7,697	-19%	\$66,916
Education and health services	82,738	86,985	4,247	5%	\$52,994
Financial activities	76,509	74,362	-2,147	-3%	\$65,301
Government	87,518	90,613	3,095	4%	\$116,472
Information	19,365	17,462	-1,903	-10%	\$95,672
Leisure and hospitality	50,374	49,096	-1,278	-3%	\$24,315
Manufacturing	15,749	13,332	-2,417	-15%	\$106,511
Other services	36,379	36,362	-17	0%	\$36,364
Professional and business services	154,920	155,589	669	0%	\$77,459
Trade, transportation, and utilities	81,052	77,385	-3,667	-5%	\$52,377
<b>Total</b>	<b>647,355</b>	<b>636,414</b>	<b>-10,941</b>	<b>-2%</b>	<b>\$69,178</b>

Source: EMSI Complete Employment - 2011.3

### 2008 Industrial Makeup

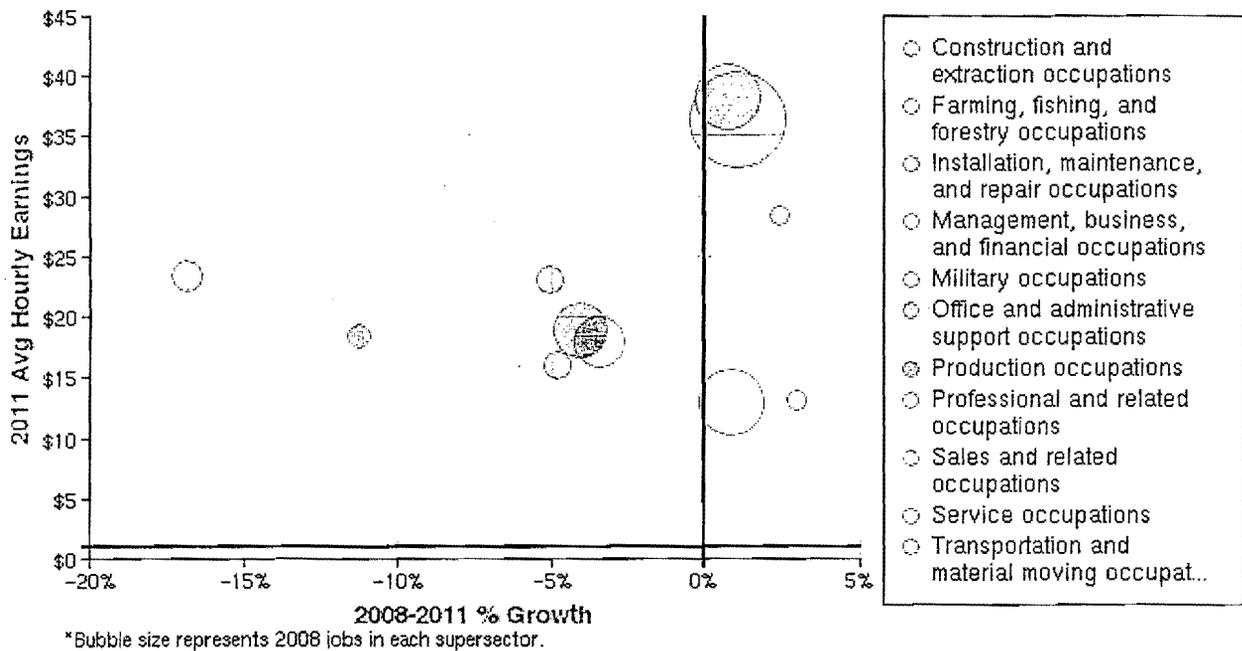


Description	2008 Regional Jobs	% Regional Jobs	2008 State Jobs	% State Jobs
Agriculture, natural resources, and mining	1,740	0.3%	25,952	0.8%
Construction	41,009	6.3%	244,105	7.2%
Education and health services	82,738	12.8%	473,539	13.9%
Financial activities	76,509	11.8%	327,145	9.6%
Government	87,518	13.5%	535,797	15.8%
Information	19,365	3.0%	64,218	1.9%
Leisure and hospitality	50,374	7.8%	289,186	8.5%
Manufacturing	15,749	2.4%	135,408	4.0%
Other services	36,379	5.6%	164,995	4.9%
Professional and business services	154,920	23.9%	564,936	16.6%
Trade, transportation, and utilities	81,052	12.5%	570,296	16.8%

Source: EMSI Complete Employment - 2011.3

## Occupation Size and Growth

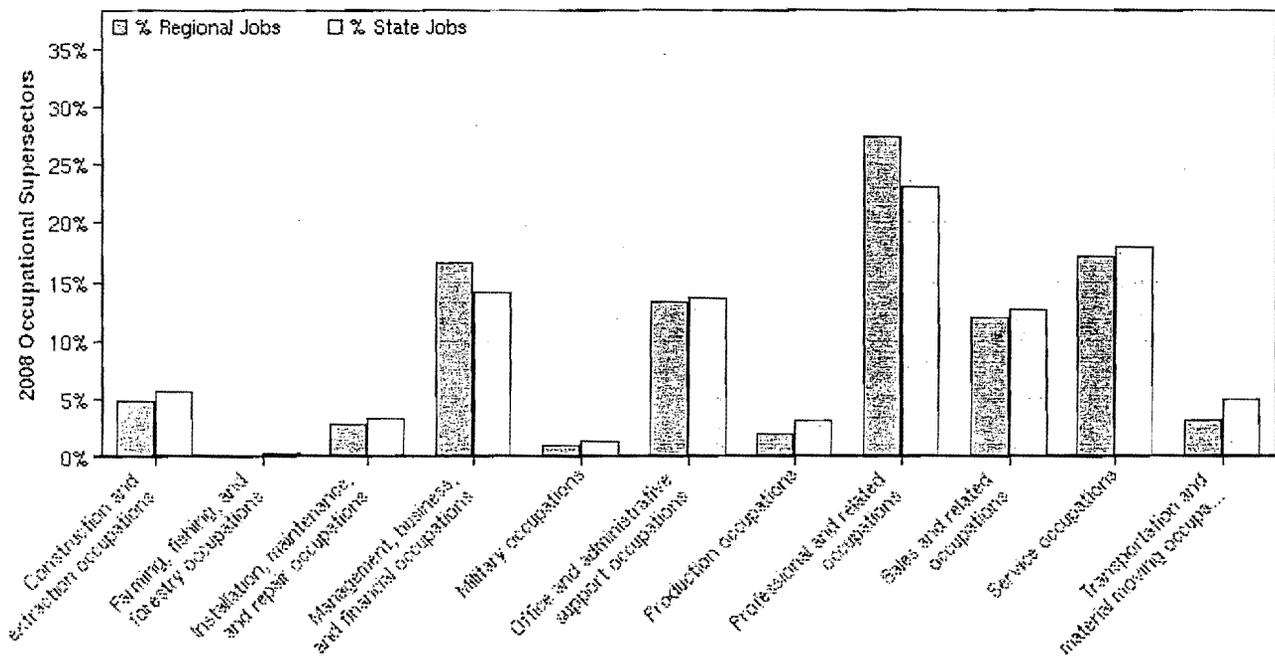
### 2008 - 2011 Size and Growth



Description	2008 Jobs	2011 Jobs	Growth	% Growth	2011 Avg Hourly Earnings
Construction and extraction occupations	31,412	26,133	-5,279	-17%	\$23.43
Farming, fishing, and forestry occupations	547	563	16	3%	\$13.21
Installation, maintenance, and repair occupations	17,888	16,990	-898	-5%	\$23.09
Management, business, and financial occupations	107,526	108,332	806	1%	\$38.30
Military occupations	6,428	6,583	155	2%	\$28.29
Office and administrative support occupations	85,377	81,925	-3,452	-4%	\$18.93
Production occupations	12,582	11,169	-1,413	-11%	\$18.43
Professional and related occupations	177,460	179,292	1,832	1%	\$36.36
Sales and related occupations	77,333	74,658	-2,675	-3%	\$17.99
Service occupations	110,791	111,715	924	1%	\$13.00
Transportation and material moving occupations	20,010	19,055	-955	-5%	\$16.04
<b>Total</b>	<b>647,355</b>	<b>636,414</b>	<b>-10,941</b>	<b>-2%</b>	<b>\$26.28</b>

Source: EMSI Complete Employment - 2011.3

### 2008 Occupational Makeup

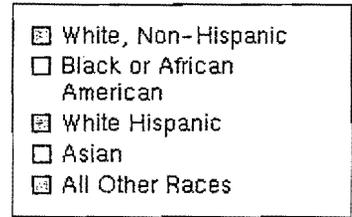


Description	2008 Regional Jobs	% Regional Jobs	2008 State Jobs	% State Jobs
Construction and extraction occupations	31,412	4.9%	191,397	5.6%
Farming, fishing, and forestry occupations	547	0.1%	8,512	0.3%
Installation, maintenance, and repair occupations	17,888	2.8%	115,112	3.4%
Management, business, and financial occupations	107,526	16.6%	477,468	14.1%
Military occupations	6,428	1.0%	46,730	1.4%
Office and administrative support occupations	85,377	13.2%	460,644	13.6%
Production occupations	12,582	1.9%	108,516	3.2%
Professional and related occupations	177,460	27.4%	783,533	23.1%
Sales and related occupations	77,333	11.9%	426,720	12.6%
Service occupations	110,791	17.1%	607,394	17.9%
Transportation and material moving occupations	20,010	3.1%	169,551	5.0%

Source: EMSI Complete Employment - 2011.3

## Demographic Overview

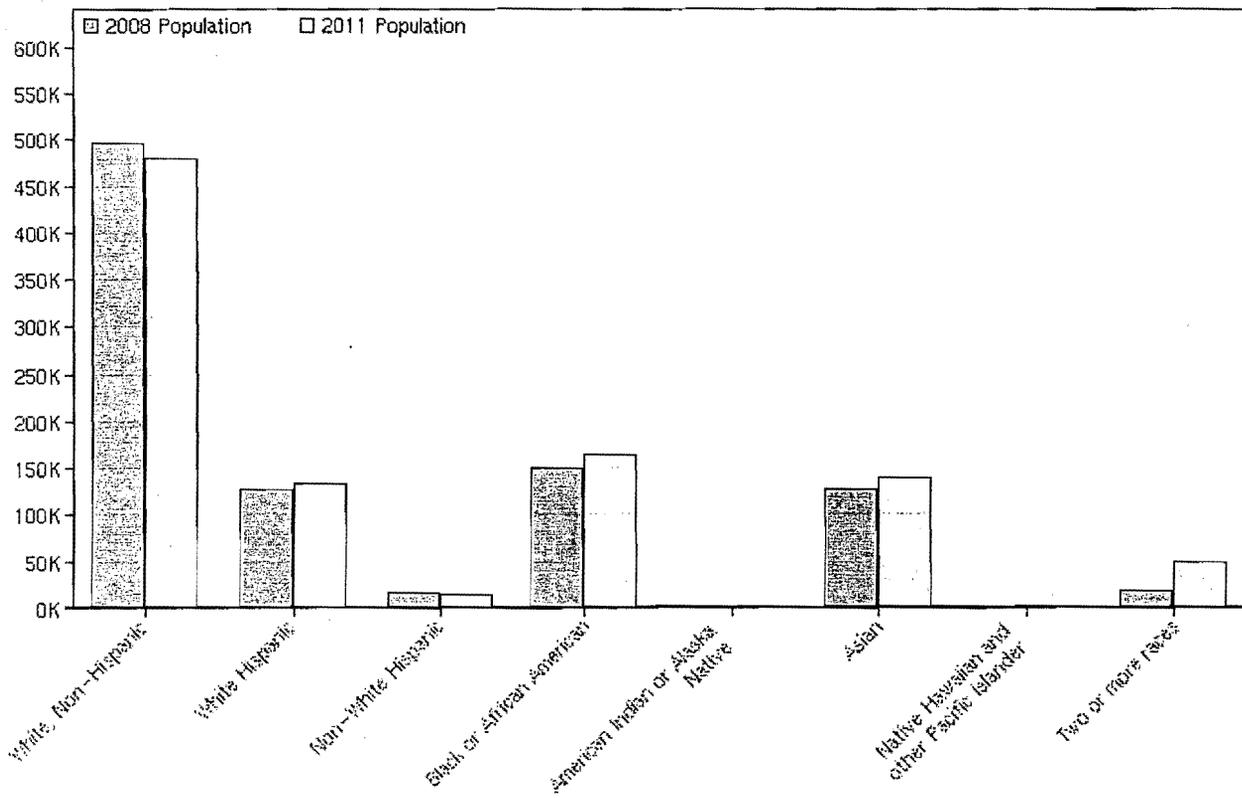
### 2008 Race/Ethnicity Breakdown



Ethnicity	2008 Population	% of Region
White, Non-Hispanic	496,126	52.82%
White Hispanic	127,128	13.53%
Non-White Hispanic	15,912	1.69%
Black or African American	151,523	16.13%
American Indian or Alaska Native	1,982	0.21%
Asian	126,943	13.51%
Native Hawaiian and other Pacific Islander	732	0.08%
Two or more races	19,009	2.02%

Source: EMSI Complete Employment - 2011.3

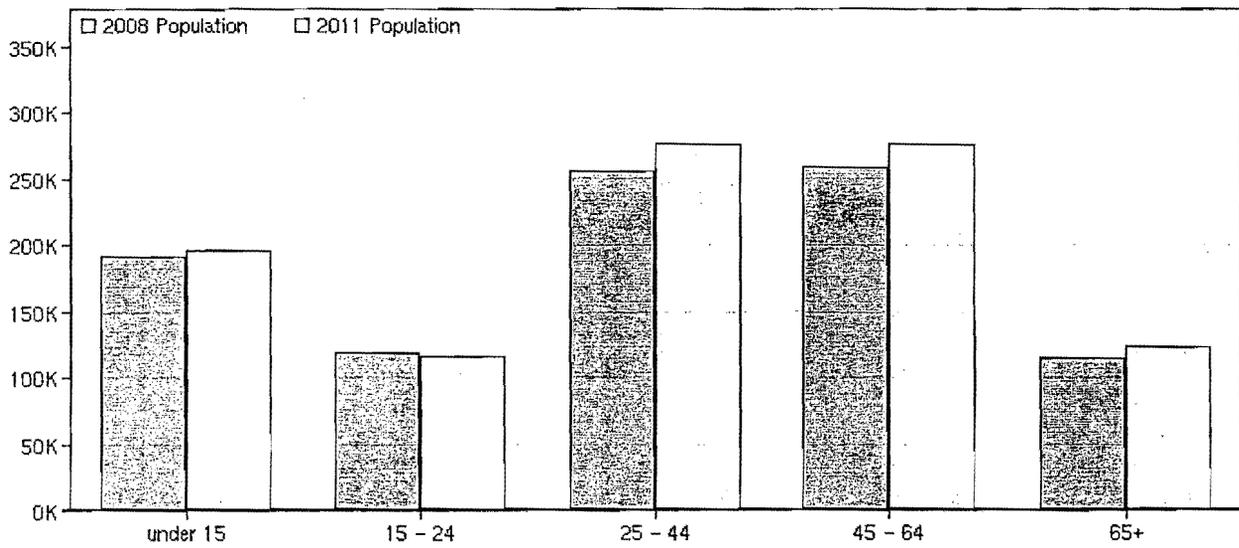
### 2008 - 2011 Race/Ethnicity Size and Growth



Race/Ethnicity	2008 Population	2011 Population	Change	% Change
White, Non-Hispanic	496,126	480,891	-15,235	-3%
White Hispanic	127,128	134,636	7,508	6%
Non-White Hispanic	15,912	14,995	-917	-6%
Black or African American	151,523	165,450	13,927	9%
American Indian or Alaska Native	1,982	1,634	-348	-18%
Asian	126,943	139,775	12,832	10%
Native Hawaiian and other Pacific Islander	732	493	-239	-33%
Two or more races	19,009	48,834	29,825	157%
<b>Total</b>	<b>939,355</b>	<b>986,709</b>	<b>47,354</b>	<b>5%</b>

Source: EMSI Complete Employment - 2011.3

**2008 - 2011 Age Size and Growth**



Age	2008 Population	2011 Population	Change	% Change
under 15	191,869	195,850	3,981	2%
15 - 24	119,045	116,126	-2,919	-2%
25 - 44	255,179	275,240	20,061	8%
45 - 64	258,763	276,149	17,386	7%
65+	114,498	123,345	8,847	8%
Total	939,355	986,709	47,354	5%

Source: EMSI Complete Employment - 2011.3

## Data Sources and Calculations

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### Industry Data

In order to capture a complete picture of industry employment, EMSI basically combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Nonemployer Statistics (NES) published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data, 15-year past local trends in each industry, growth rates in statewide and (where available) sub-state area industry projections published by individual state agencies, and (in part) growth rates in national projections from the Bureau of Labor Statistics.

### Occupation Data

Organizing regional employment information by occupation provides a workforce-oriented view of the regional economy. EMSI's occupation data are based on EMSI's industry data and regional staffing patterns taken from the Occupational Employment Statistics program (U.S. Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one from the U.S. Department of Education, with customizations by EMSI.

### Demographic Data

The demographic data in this report is compiled from several sources using a specialized process. Sources include US Census Bureau annual estimates, birth and mortality rates from the US Health Department, and projected regional job growth.

### State Data Sources

This report uses state data from the following agencies: Maryland Department of Labor, Licensing and Regulation, Office of Labor Market Analysis and Information.

## Data.com for Salesforce

### Jigsaw.com/D&B.com

Jigsaw is a leading provider of business information and data services that uniquely leverages user-generated content contributed by its global business-to-business community of 1.8 million members. Jigsaw gives individuals and companies access to business contact information for 27 million business professionals and profiles of 4 million companies. In addition to delivering low-cost and easy access to high-value business information for sales, marketing, and customer service, Jigsaw provides a variety of cloud-based data acquisition and management services. Founded in 2004, Jigsaw is a salesforce.com company.

Jigsaw is the leading provider of accurate business contact data in the cloud with the ability to view and search across all contacts based on user defined criteria. Once contacts are identified they are imported directly into salesforce.com. Data.com refreshes and flags out-of-date data turning unusable records into active leads by filling in missing data from Jigsaw or selecting the fresher data to clean existing contacts. The process can be automated to clean all inbound leads.

- Boost sales with new prospects
- Access 30M+ business contacts
- Research & import accounts
- Find more contacts in accounts
- Build targeted lists in real-time
- Fill in missing contact & account info
- Improve performance with clean data
- Import 300 records per month

The below fields are available in the product today from Jigsaw/Data.com and it is salesforce.com's intent that the data for these fields will be sourced from Dun & Bradstreet (D&B Basic Data) in the fall of 2011. Data.com's current plans are for existing Jigsaw/Data.com customers to automatically receive the new D&B-sourced data when the new data becomes available.

- Facsimile Number (non-US only)
- International Dialing Code
- Primary SIC (4 digit SIC) – Industry (2-digit SIC)
- Stock Exchange
- Out of Business Indicator – Active/Inactive Status
- Metropolitan Statistical Area (MSA)
- Location Status
- DUNS Number
- Primary NAICS
- Year Started
- Mailing address, city, state, country code, ZIP and shipping address
- Latitude and Longitude

# Screenshot Of Biotech Gate

Companies Products Technologies Financing rounds

Management Deals all



Database Pricing About Biotechgate News Events Job Market  
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Profile download Contact details Bookmarks & Notes Financials Product Pipelines

(21'785) Companies

(22'290) Products

(2'708) Technologies

(2'720) Financing rounds

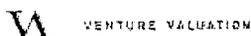
(200) Company valuations

(25'948) Management details

(3'910) Licensing opportunities

(1'338) Deals

Database provided by



Featured company



Partners



naturejobs.com



## Profile download

Results lists for all areas (such as companies, products etc.) can be downloaded to excel.

Please note that the excel download does not contain the complete information available in the profile and that not any information is available for each company. The following list provides an overview about the details which are included in each download.

### Companies:

- Company name
- City, country
- Website
- Sector
- Number of employees
- Total number of products in development / on the market
- Company description
- Year of foundation
- Summary of products
- Summary of technology used
- Revenues
- Ownership
- Primary stock exchange (public companies)
- Ticker symbol (public companies)
- Market cap (public companies)
- Valuation (private companies)
- Amount of money raised

### Products and technologies:

- Product / technology name
- Name of company that owns product / technology
- Type of product / technology area
- Indication / technology sub-area
- Availability for in- / out-licensing
- Clinical phase (for products only)
- Description

### Financing rounds:

- Company name
- Date (month and year) of financing
- Company financing stage
- Investment amount
- Valuation
- Lead investors
- Comments and remarks about milestones
- Latest round (yes / no)

### Management:

- Company name
- Title and name
- Position / function

3'

- [Phone number](#)

You can generate and download a PDF-profile of each company profile. The PDF document contains all information like company description, product pipeline, contact details etc. in a compact format.

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[Technologies](#)  
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Programme

# Tech Transfer Summit North America 2011

Licensing, Partnering & Value Creation



## TECH TRANSFER SUMMIT NORTH AMERICA

Licensing - Partnering - Technology Transfer



Venue: Masur Auditorium, Building 10  
National Institutes of Health (NIH)  
9000 Rockville Pike  
Bethesda, Maryland 20892

### Day One - Monday 3 October 2011

\*\*\*SUBJECT TO FINAL CHANGES\*\*\*

- 08:30**     **Registration & Coffee**
- 09:00**     **Official Opening and Welcoming Introduction to the 2nd annual Tech Transfer Summit North America**
- TTS Ltd.
  - Welcome Remarks by Judy Britz, Executive Director, Maryland Biotechnology Center
- 09:15**     **Keynote: Official Opening – Michael Gottesman, Deputy Director for Intramural Research, NIH**  
**“Translational Medicine & Funding Innovation”**
- 10:00**     **Successful Implementation of Biotech Innovation Strategies Worldwide**  
Moderator: Christian J. Suojanen, Co-Chair, TTS Ltd
- Richard Rodriguez, Director, Division of Technology Development & Transfer, OTT, NIH
  - Stéphane Hogan, Head of Unit, Coordination, Health DG Research, European Commission
  - Alicia Löffler, Executive Director, Innovation and New Ventures, and Associate Vice President for Research, Northwestern University
  - Peter Brenders, CEO, BIOTECanada
- 11:00**     **Coffee & Networking**
- 11:30**     **Building Better Academia-Industry Collaborations: How will Big Pharma fill its early-stage Pipeline in 5 years' time?**  
Moderator: Morris S. Berrie, Co-Chairman, TTS Ltd.
- Irena Melnikova, Director, Prospective & Strategic Initiatives, Sanofi
  - Sanjeev Munshi, Director, Licensing and External Research, Merck & Co
  - Brian Cummings, Vice President for Technology Commercialization, Ohio State University
  - Kathleen Denis, Associate VP, Office of Technology Transfer, Rockefeller University
  - John Reid, Director, AstraZeneca
- 12:30**     **Networking Lunch**



## TECH TRANSFER SUMMIT NORTH AMERICA

Licensing - Partnering - Technology Transfer



### Day One continued - Monday 3 October 2011

#### 13:30 Understanding Translational Medicine & the resulting opportunities

Moderator: Morris S Berrie, Co-Chairman, TTS Ltd.

- Chris Austin, Director, NIH Center for Translational Therapeutics, National Chemical Genomic Center
- David Kaslow, Head of Vaccines Project & Pipeline Leadership, Merck & Co
- Frances Toneguzzo, Director, Corporate Sponsored Research & Licensing, Massachusetts General Hospital

#### 14:30 What are the main challenges & opportunities in Orphan Drugs, Diagnostics & Personalized Medicine?

Moderator: Judy Britz, Executive Director, Maryland Biotechnology Center

- Ed Mascioli, Head of Orphan & Genetic Diseases Research Unit, Pfizer
- Arthur Tzianabos, Vice President of Research, HGT Division, Shire
- Steve Groft, Director, Office of Rare Diseases Research, NIH

#### 15:30 Coffee & Networking

#### 16:00 Keynote: James C. Greenwood, President & CEO, Biotechnology Industry Organization (BIO). "Barriers to Innovation in Biotechnology, and Industry Proposals for the road forward"

#### 17:00 The PE, VC & Institutional Investor perspective.

Moderators: Morris S. Berrie & Christian Suojanen, Co-Chairman, TTS Ltd

- Alain Maiore, Managing Partner, KLS Partners, France
- James W Hawkins, Managing Director, FOCUS LLP
- Phil Ross, Managing Director, Healthcare, JPMorgan
- Maarten deJong, Managing Director, Barclays Capital

#### End of Day One

#### 18:15 Tech Transfer Summit North America - Evening Reception



## TECH TRANSFER SUMMIT NORTH AMERICA

Licensing - Partnering - Technology Transfer



### Day Two - Tuesday 4 October 2011

**08:30** Registration & Coffee

**08:55** Opening Remarks

**09:00** Keynote Panel

**Med Apps: The impending conundrum of uniting IT & Life Sciences Innovation and the FDA**

Moderator: Morris S. Berrie, Co-Chairman, TTS Ltd

- Jason Brooke, Associate, Life Sciences & Healthcare, Epstein Becker Green
- Bakul Patel, Policy Advisor, FDA
- Anand Iyer, President, WellDoc
- Mark Jeffrey, Telemedicine & Advanced Technology Center (USAMRID)
- Harry Goldberg, Assistant Dean and Director of Academic Computing, Faculty, Biomedical Engineering, John Hopkins University

**10:00** IP & Licensing for the Global Biotech Sector

Moderator: Christian J. Suojanen, Co-Chairman, TTS Ltd

- Kevin Noonan, Partner MBHB, & Editor Patent Docs
- Cyra Nargolwalla, Partner, Cabinet Plasseraud
- Denise Hirsch, Director Intellectual Property, Inserm-Transfert
- Andrew Robertson, Chief Policy Officer, BIO Ventures for Global Health
- Ofra Weinberger, Director, Science and Technology Ventures, Columbia University Medical Center

**11:00** Coffee & Networking

**11:30** The Evolving Pharma-Licensing Model

Moderator: Morris S. Berrie, Co-Chairman, TTS Ltd

- Erik Lium, Assistant Vice Chancellor of Research, UCSF
- Gary Howes, Partner, Fasken Martineau
- Chris Yochim, Director External Relations, AstraZeneca
- J.J. Finkelstein, CEO, RegeneRx
- Rosemarie Truman, CEO and President, RHT Consulting

**12:30** Networking Lunch



## TECH TRANSFER SUMMIT NORTH AMERICA

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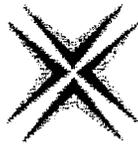


- 13:30**    **Efficient use of Capital, Working Collaboratively, and Bringing New Therapies to Markets and Patients. New Models in successful biotech commercialisation**  
Moderator: Christian J. Suojanen, Co-Chairman, TTS Ltd.
- Margaret Anderson, CEO, FasterCures
  - Brian Kelly, Director, Technology, Enterprise & Commercialisation, Weill Cornell Medical College
  - Daniel Perez, Venture Partner, Bay City Capital
  - Hubert Birner, Partner, TVM Capital
- 14:30**    **Core Competencies: The relationship between Venture Capitalists and Pharma Business Development & Licensing Executives**  
Moderator: Morris S. Berrie, Co-Chairman, TTS Ltd
- Glen Steinbach, COO, Johns Hopkins Technology Transfer
  - Markus Goebel, Managing Director, Novartis Venture Fund
  - Ron Newbold, Vice President, Strategic Research Partners BioInnovation Line, Pfizer
  - Irena Melnikova, Director, Prospective & Strategic Initiatives, Sanofi
- 15:30**    **Closing Discussion & End of Summit**



# TECH TRANSFER SUMMIT NORTH AMERICA

Licensing - Partnering - Technology Transfer



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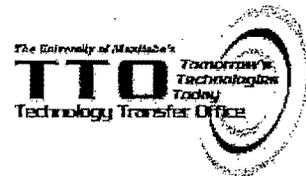
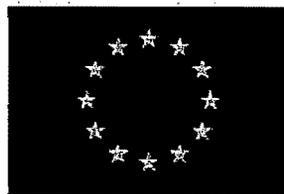
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VENTURE VALUATION

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