Deliverable 1.3 | Analysis across regional innovation and acceleration ecosystems

Funded by the European Union

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or European Innovation Council and SMES Executive Agency (EISMEA). Neither the European Union nor the granting authority can be held responsible for them.

Grant agreement number	101072248
Project acronym	Food-scalEUp
Project name	Food-scalEUp: Expanding the European digital agri-food acceleration ecosystem

Deliverable number	D1.3
Deliverable responsible	Valorial
Work package	WP1
Editor	Thibaud Gremme, Adrienne Gentil
Deliverable type	R – Document, report
Dissemination level	PU - Public

DOCUMENT VERSION HISTORY			
Version	**Date**	**Modification introduced**	**Modified by**
V.1	15/01/2023	First version	Thibaud Gremme, Adrienne Gentil
V.2	17/02/2023	Revised version including update	Thibaud Gremme, Noelia Dosil, Ana Felgueiras
V.3	21/02/2023	Final version including update	Thibaud Gremme, Olga Romero

Abstract
The purpose of this document is to develop an analysis across the regional acceleration ecosystems of the Food-scalEUp partners to identify similarities, complementarities, and common needs. This cross analysis is the result of the findings obtained in D1.1 and D1.2 and is intended to serve as a compass for further activities.

Table of content

1 Introduction 4

2 Methodology 4

3 Food-scalEUp cross analysis of regional acceleration ecosystems 5

3.1 Acceleration areas of improvement: priorities and opportunities 5

3.1.1 Ecosystem approach 5

3.1.2 Business service approach 7

3.2 Acceleration complementarity: synergies and capacity building 9

3.2.1 Ecosystem approach 12

3.2.2 Business service approach 13

4 Conclusions 15

List of figures

Figure 1. Mind map representation of acceleration areas of improvement 5
Figure 2. Shared 4 Helixes representation of the agrifood and digital ecosystem.......... 9
Figure 3. Shared role representation of the agrifood and digital ecosystem. 10
Figure 4. Shared representation of mandatory presence in the region 10
Figure 5. Shared representation of required involvement stages 11
Figure 6. Shared representation of available services 11

List of tables

Table 1. Areas of improvement in terms of the ecosystem approach 6
Table 2. Areas of improvement in terms of the business service approach 8
Table 3. Matrix of available and missing actors 12
Table 5. Matrix of available and missing agrifood services 13
Table 6. Matrix of available and missing crosscutting services 14

1 Introduction

The vision of the Food-scalEUp project is to foster the capacity of European regional agri-food digital innovation ecosystems, especially in “emerging” and “moderate” innovator regions, to be more connected, effective, impactful, resilient and internationally recognized.

More specifically, the mission of Food-scalEUp project is to: develop higher quality business acceleration services in agri-food digital innovation ecosystems of emerging and moderate innovator regions; expand the connections, knowledge, exchange, collaboration at regional, European and international level, between key people representing the different actors of the agri-food digital innovation ecosystems involved in the project; and balance the scaling-up of start-ups and SMEs and the creation of local high-value added jobs in the European regions involved in the project, by balancing the capacity of agri-food digital innovation and acceleration ecosystems in those regions.

2 Methodology

As a first step, the objectives of WP1 are to identify key actors, programmes and services and to identify the needs of end-users of acceleration services to determine strengths and weaknesses. This is to generate assessments for improvement in terms of ecosystems and business services such as acceleration practices of primary interest and identification tools.

Based on the results of deliverables 1.1 “Acceleration ecosystems mapping” and 1.2 “Characterisation of start-ups and SMEs” which presented each partner's regional acceleration landscape (key players involved, available business services and feedback from acceleration end-users), we cross-referenced all elements of the investigation to determine what needs to be addressed during the project and with which intensity.

All the inputs and lessons learned from successful and less successful processes were cross analysed, leading to the establishment of common objectives and common themes of primary interest that can be built upon to develop relevant exchange groups and acceleration perspectives.

3 Food-scalEUp cross analysis of regional acceleration ecosystems

The following chapter presents the results of the investigation carried out within the partnership's acceleration ecosystems. The elements analysed provide recommendations schemes, ways for improving the acceleration themes and how to handle them. Therefore, an analysis of the information at ecosystem and business service level is presented here, showing the gaps and assets.

3.1 Acceleration areas of improvement: priorities and opportunities

Based on the feedback of the end-users of acceleration services consulted in previous activities of WP1, a set of 6 areas for improvement were identified (Figure 1). To address them in an operational way, we have reclassified them into two categories of action: namely, an ecosystem approach and a business services approach.

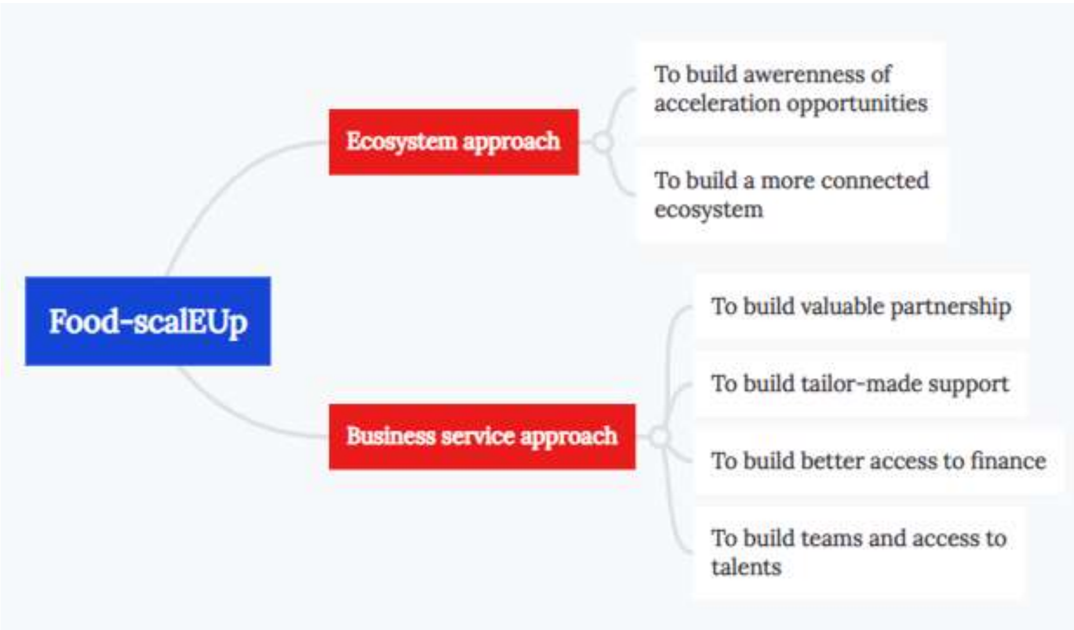

Figure 1. Mind map representation of acceleration areas of improvement

Each area of improvement is designed to be shared by all the Food-scalEUp partners and can be considered as regional priorities where they have been formulated. Thus, the same directional feedback patterns were combined to highlight priority areas.

In the following sections the improvement areas, both in the ecosystem approach and business service approach, are described.

3.1.1 Ecosystem approach

The ecosystem approach refers to the interaction and implementation between key stakeholders and end-users of acceleration services.

To build awareness of acceleration opportunities

The main point is to reduce the time and misunderstanding of end-users when it comes to finding acceleration services and programmes that meet their expectations. Indeed, it is about facilitating understanding of what is available to improve the sectoral knowledge of the acceleration end-users.

Mentioned solutions and possible perspectives:

- Having a single regional entry point for acceleration end-users (perhaps a public body).
- Having a directory of resources for business acceleration services, or an application on the mobile phone that would support such a device.
- Having dedicated events.
- Having a balance between incubation offers and acceleration offers.
- Having programmes that complement each other (involvement, thematic, services etc.)
- Having a higher receptivity of agri-food startups by getting closer to the rural and agricultural environment. It is a question of opening the cultural codes of accelerators to make them more accessible to the most remote profiles.
- Having a redefinition of acceleration support for the agri sector (profile of the players, long time-to-market, associated risks etc.).

To build a better connected ecosystem

Having a better connected ecosystem is linked with the involvement of key acceleration actors with one another. The plan is to be able to establish closer relationships between the different players in the ecosystem to have a varied and well-segmented acceleration offer with a high level of interactivity.

Mentioned solutions and possible perspectives:

- Having ASP (Acceleration Service Providers) from the entire agri-food value chain involved in acceleration services.
- Having acceleration ecosystems which serve as an innovation catalyst for investment funds (encourage engagement in R&D).
- Having redirection towards other acceleration services (in terms of digital projects, industrial or laboratory projects...).
- Having a regional acceleration community and/or a broad sense of regional acceleration and focussing on the whole territory, not area by area.
- Having more political entities included to favour the development of certain activities, such as the provision of operating space (for industrialisation or other purposes).
- Having a follow-up to accompany the start-ups with a long-term commitment, pushing the project to the end.
- Having a regional and European network of test facilities to try and improve the products.

Table 1. Areas of improvement in terms of the ecosystem approach

Innovation scoreboard	Region	To build awareness of acceleration opportunities	To build a more connected ecosystem
Emerging	Közép-Dunántúl		X
Moderate	Galicia	X	X
	Navarra	X	X

	Normandie		
	Pays de la Loire	X	
Strong	Bretagne	X	X
	PACA & Auvergne Rhône-Alpes	X	X
	Ostwestfalen-Lippe & North Rhine-Westphalia	X	X
Leader	Gelderland & Noord-Brabant	X	X

Note – Crosses (X) indicate the themes mentioned by consulted companies

From the above table it is straightforward to see that all regions have a challenge with the clearness of the acceleration offer and its connectivity. However, it can be observed that this did not emerge in the Normandy region, possibly due to its more restricted programme offer.

3.1.2 Business service approach

The business service approach refers to the practical and tangible acceleration offer linked with the expectations of end-users of acceleration services towards key actors.

To build valuable partnership

This area of improvement results from the fact that start-ups need to get closer to their customers and to those who validate their technology to scale up. Identified in emerging and developing regions, it is particularly important to be able to get in touch with the industry and distribution chains. The idea is to reduce time to access the market by bringing together collaborators who understand the added value of a food solution, even in a niche market.

Mentioned solutions and possible perspectives:

- Having agrifood driving companies involved in acceleration programmes.
- Having targeted companies that could present their barriers, to best adapt the proposed and envisaged innovation.
- Having reliable partners when getting involved in an exposed environment.
- Being introduced and/or presented to large industrial groups with recommendation and institutional support.
- Opening business services, such as coaching and trainings, to international partners.

To build tailor-made support

There is a requirement for uniform acceleration of start-ups, but in the early stages of development. For this reason, when it comes to tailor-made support for agribusiness acceleration, it is the individual needs of the start-up and its specific solution that need to be supported and in concrete terms by a human follow-up with reliable agro-related expertise. Being advised more by people who are field-oriented and less by people who are strategy-oriented.

Mentioned solutions and possible perspectives:

- Having very practical training with real start-up cases.
- Having increase mentoring hours and access to subject matter experts with a pool of hours.
- Having acceleration offer to provide technical and highly qualified support for innovative projects: advice from engineers, researchers, academics.
- Having accelerator and investor need to adapt to the segmentation of agri-food companies.
- Having less oral support and more daily support in developing the business model into reality, for example by allowing long-term coaching.
- Having a focus on the founder of the company and affiliated team members as they must implement the learnings.

To build better access to finance

Quite common among start-ups but necessary to break the glass ceiling for agri-food funding. In many cases, there is no financial support or revenue to fund acceleration, and it is difficult to find people or entities for agrifood innovative projects that are willing to take risks.

Mentioned solutions and possible perspectives:

- Having awareness of dedicated agri-food funding possibilities.
- Having support in accessing tenders or soft loan opportunities.
- Having less bureaucracy and less guarantees requests.
- Having facilities to begin the first fundraising.
- Having a dedicated European investment fund for foodtech

To build teams and access to talents

The expressed purpose here is linked to the companies need to have a proper qualified team in order to develop the maturity of the company. Similarly, it is about being able to build a team with a culture and governance model that matches the company's ambition.

Mentioned solutions and possible perspectives:

- Having a medium from accelerators providing an overview of available talent within a territory
- Having coaching and training seminars to strengthen leadership skills.
- Having learning material for monitoring team health, such as mental coaching and how to lead a team (corporate culture on the agenda of accelerator components).

Table 2. Areas of improvement in terms of the business service approach

Innovation scoreboard	Region	To build valuable partnership	To build tailor-made support	To build better access to finance	To build teams and access to talents
Emerging	Közép-Dunántúl	X	X	X	
Moderate	Galicia	X	X		
	Navarra	X	X		
	Normandie	X	X		

	Pays de la Loire	X	X		X
Strong	Bretagne		X		X
	PACA & Auvergne Rhône-Alpes	X	X	X	
	Ostwestfalen-Lippe & North Rhine-Westphalia		X		X
Leader	Gelderland & Noord-Brabant		X	X	

Note – Crosses (X) indicate the themes mentioned by consulted companies

From the above table all regions are in demand for more personalised support, which already shows a priority on which to focus. On the other hand, we can see that the strong and leading regions tend to be better organised in building partnerships, which can lead to more top-down and bottom-up cooperation between more and less developed region.

3.2 Acceleration complementarity: synergies and capacity building

First of all, the set of actors mapped within the acceleration ecosystems are represented in the Food-scalEUp directory and is meant to provide a global overview of the main stakeholders involved and the existing resources to accelerate startups, such as to develop improved business services.

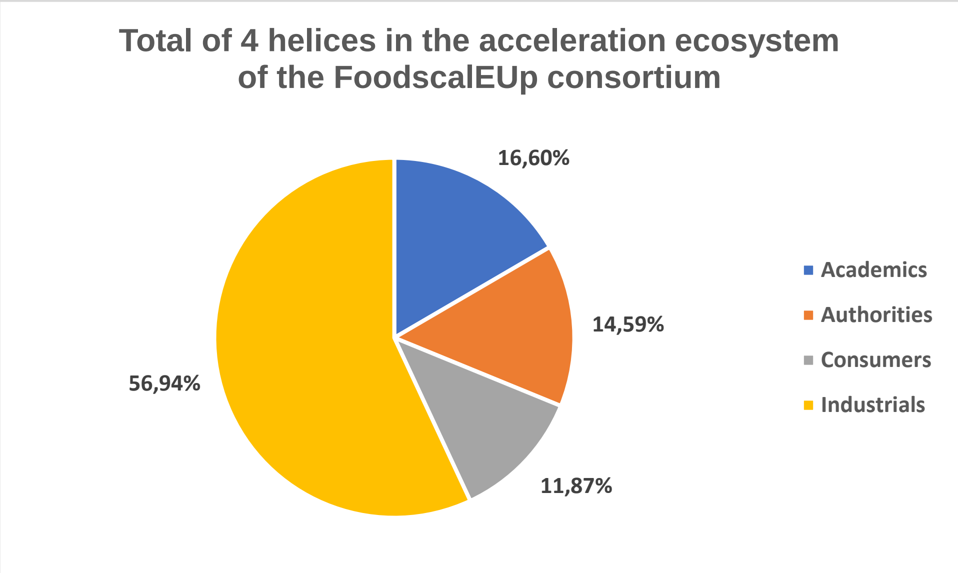

Figure 2. Shared 4 Helixes representation of the agrifood and digital ecosystem.

To develop new acceleration services and to connect acceleration stakeholders, we can therefore, consider the overall shape of the identified acceleration ecosystems. Building on available resources, an actionable exchange scheme can be taken into account.

As a result, from the average of types of actors involved in acceleration ecosystems, it is conceivable that a pattern for building new acceleration activities could engaged the described representation of actors:

- Industrials 50%
- Public Authorities 20%
- Academics 20%
- Consumers 10%

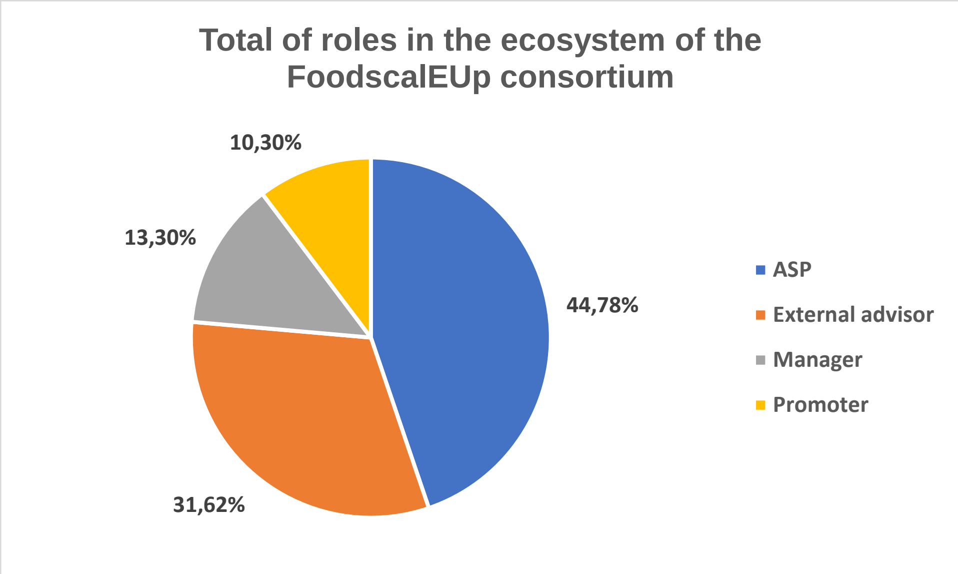

Figure 3. Shared role representation of the agrifood and digital ecosystem.

In a similar way, the typical role distribution model can be designed. However, external advisors are not to be considered directly as they are seen as an external resource. In this sense, the distribution of roles by ecosystem and/or programmes tends towards the following pattern:

- ASP 80%
- Manager 10%
- Promoter 10%

In a second step, the set of identified programmes within the acceleration ecosystems are represented within the Food-scalEUp portfolio of available services and aims to provide a global overview of the main programmes and the existing business services to accelerate startups, such as to develop improved business services.

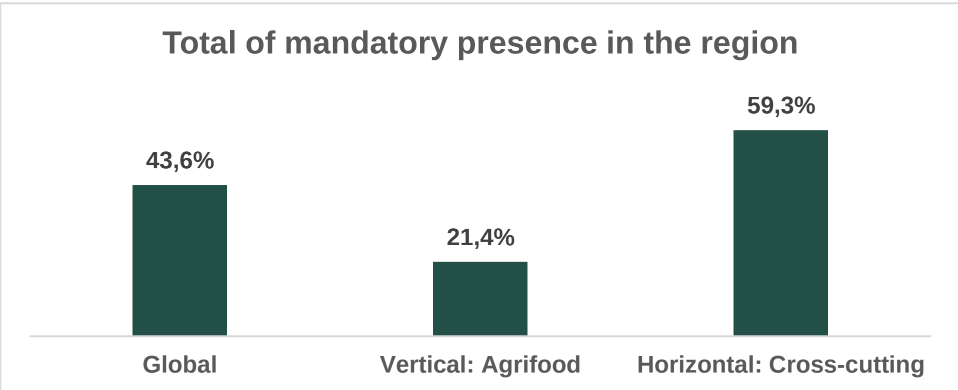

Figure 4. Shared representation of mandatory presence in the region

Considering the amount of acceleration programmes identified with 42 vertical and 59 horizontal programmes, it can be observed that 44% of the programmes require a mandatory presence of the beneficiary companies in the region, increasing in horizontal programmes (60%) compared to verticals (21%).

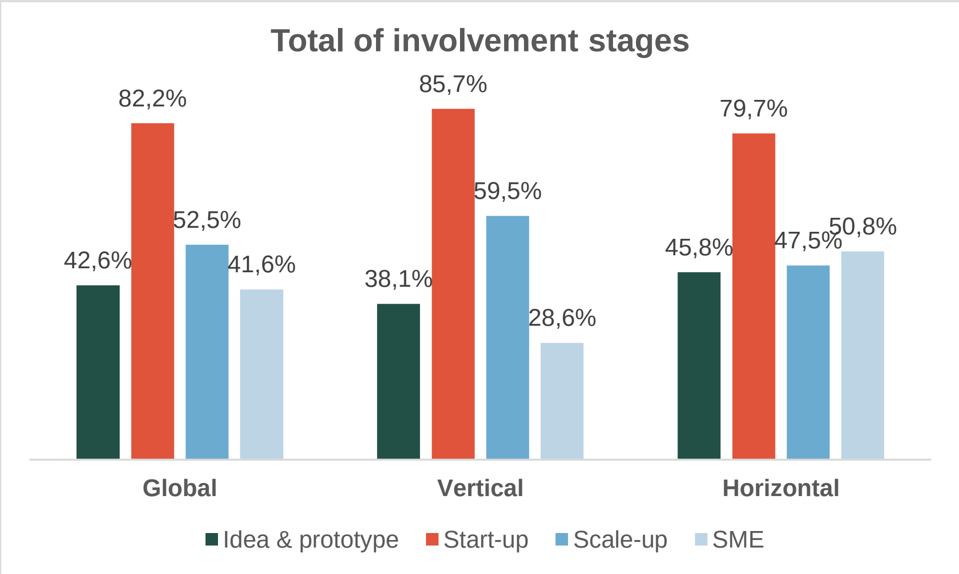

Figure 5. Shared representation of required involvement stages

The types of companies benefiting from most of the acceleration programs are startups, followed by scale-ups. In the vertical acceleration programmes, it is the SMEs who find the fewest programs, while in the horizontal programs the companies that are in the idea and prototyping phase are the ones with the fewest programs designed for them.

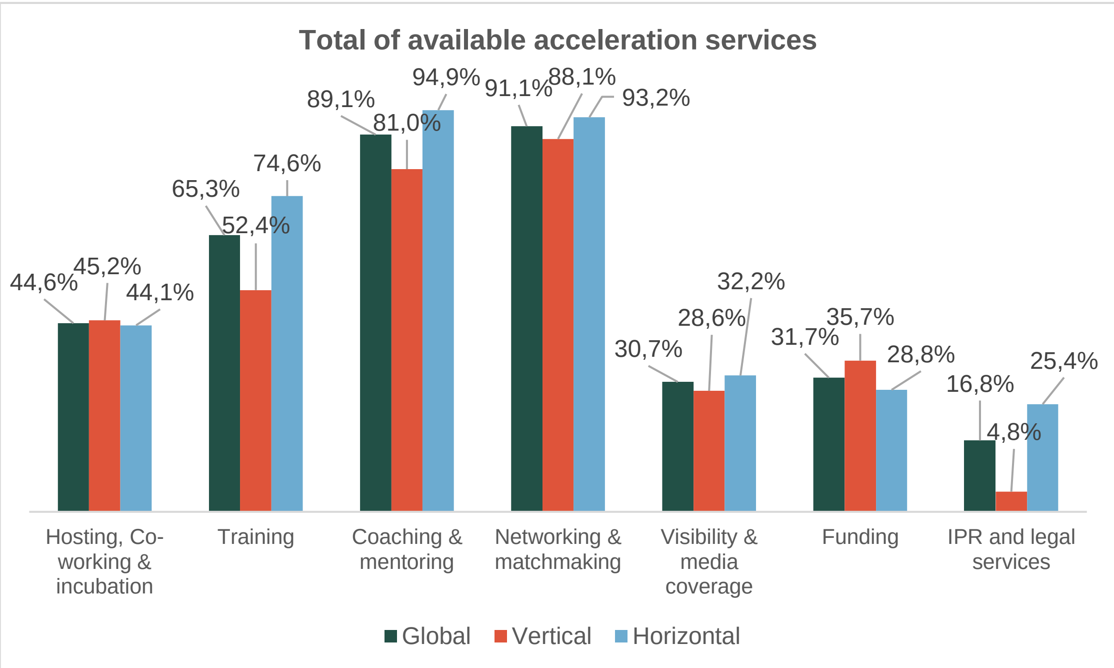

Figure 6. Shared representation of available services

While coaching and networking services are widely covered by most programs, we found areas for improvement in terms of coverage of services such as visibility, financing and, especially, support on legal issues and intellectual property protection.

Identification matrix of accessible actors and services

The Food-scalEUp partners gave their acceleration landscape on the different items that were identified and defined in D1.1. "Acceleration ecosystems mapping".

Each column gathers the score registered by each partner and to highlight the information obtained and potential synergies we have compiled them. The red cells correspond to a critical lack of actors and orange corresponds to a single identified actor and therefore, a lack of synergies. The green cells indicate at least two actors and highlight a point of emphasis.

(Red: critical - Orange: lack of synergy - Green: accessible)

3.2.1 Ecosystem approach

Table 3. Matrix of available and missing actors

Innovation scoreboard	Region	4H	ASP	External advisor	Manager	Promoter
Emerging	Közép-Dunántúl	Academics	3		1	1
		Authorities		1	1	2
		Consumer	2	1		1
		Industrials	10	1	3	3
Moderate	Galicia	Academics	3			
		Authorities				3
		Consumer		5		
		Industrials	23	3	4	3
	Navarre	Academics	1	1		
		Authorities	3	3	3	2
		Consumer		26		
		Industrials	30	18		10
	Normandie	Academics	25	12	1	
		Authorities	3	15	3	2
		Consumer	15	13		
		Industrials	48	22	1	1
	Pays de la Loire	Academics	15		4	
		Authorities	4		1	4
		Consumer	7	1		
		Industrials	33	1	5	5
Strong	Bretagne	Academics	6	4	1	1
		Authorities		2	2	
		Consumer	1			
		Industrials	4	8	2	7
	PACA & Auvergne Rhône-Alpes	Academics	12	3	6	1
		Authorities	8	3		2
		Consumer	1	6		
		Industrials	33	64	8	
	Ostwestfal en-Lippe & North Rhine-Westphali a	Academics	4		6	
		Authorities	2		5	3
		Consumer				
		Industrials	5	1		4

Innovation scoreboard	Region	4H	ASP	External advisor	Manager	Promoter
Leader	Gelderland & Noord-Brabant	Academics	1	3	1	
		Authorities	4	4	10	7
		Consumer	3	1		
		Industrials	4	5	16	13

From the table above, we can address three issues of primary interest:

- The inclusion of new key players (manager, promoter, ASP) with at least two players per region.
- The involvement of more consumers in the acceleration ecosystem, perhaps as ASP or external advisors.
- The use of external advisors as a potential resource to fill gaps in the ecosystem.

In addition, we can observe that emerging/moderate and strong/leader innovator regions having a wide range of stakeholders in one category is not necessarily the most essential, as long as a sufficient number of stakeholders can advance the necessary roles.

3.2.2 Business service approach

Table 4. Matrix of available and missing agrifood services

Innovation scoreboard	Region	N° of programmes	Hosting, Co-working & Incubation	Training	Coaching & mentoring	Networking & matchmaking	Visibility& media coverage	Funding	IPR and legal services
Emerging	Közép-Dunántúl	7	2	5	5	5		5	
Moderate	Galicia	4	1	3	4	4	4	3	
	Navarre	3	2	2	2	2	2	1	
	Normandie	1	1	1	1	1	1	1	
	Pays de la Loire	1		1	1	1	1	1	
Strong	Bretagne	2		1	2	2			
	PACA & Auvergne Rhône-Alpes	3	1	1	3	3	2	1	1
	Ostwestfalen-Lippe & North Rhine-Westphalia	9	7	2	9	9	2		1
Leader	Gelderland & Noord-Brabant	12	5	6	7	10		3	

From the above table, we can observe the number of vertical services that are already proposed within the partnership.

Table 5. Matrix of available and missing crosscutting services

Innovation scoreboard	Region	N° of programs	Hosting, Co-working & Incubation	Training	Coaching & mentoring	Networking & matchmaking	Visibility& media coverage	Funding	IPR and legal services
Emerging	Közép-Dunántúl	6	1	5	6	6	1	4	2
Moderate	Galicia	3		3	3	3	1	1	1
	Navarre	6	6	6	6	6	6	2	
	Normandie	4	3	3	4	4	4	1	
	Pays de la Loire	11	4	9	11	8		2	4
Strong	Bretagne	14	6	11	14	14	4	3	3
	PACA & Auvergne Rhône-Alpes	8	3	4	8	8	1	3	3
	Ostwestfalen-Lippe & North Rhine-Westphalia	3	2	2	2	2	1		1
Leader	Gelderland & Noord-Brabant	4	1	1	2	4		1	1

From the above table, we can observe the number of horizontal services that are already proposed within the partnership.

Focus on services and programmes

Given the scope of the regional innovation scoreboard (comparison between the most and least developed regions), we note that the gap between regions is not meant to be directly expressed by the number of services. The strength of each ecosystem to accelerate companies is therefore expressed through 3 different axes:

- Balance between horizontal and vertical services (Közép-Dunántúl, Galicia)
- Majority of horizontal services (Navarra, Normandy, Pays de la Loire, Bretagne, PACA & Auvergne Rhône-Alpes)
- Majority of vertical services (Ostwestfalen-Lippe & North Rhine-Westphalia, Gelderland & Noord-Brabant)

In this way, we can deduce a pathway to strengthen the share of agri-food innovation and the criteria to be considered when engaging acceleration actors at European level. The initiatives to be implemented to foster the acceleration of agri-food startups should therefore aim at transposing the horizontal proportion into the vertical, allowing agri-food startups to better face their daily challenges.

The matrixes are therefore, to be taken as a support to observe and see in detail who is to be solicited, also from the database or the documents produced in deliverables 1.1 “Acceleration ecosystems mapping”.

4 Conclusions

As an outcome, this document crosses together the key acceleration items that have been identified in deliverables 1.1 “Acceleration ecosystems mapping” and 1.2, “Characterisation of start-ups and SMEs” to present the priorities, opportunities, capacity building and synergies of the Food-scalEUp partnership to engage stakeholder and improving business services.

By highlighting the digital & agrifood acceleration specificities in terms of improvements acceleration practices and factors to improve we could produce identification tools and actionable topics of interest. Common background and improvement areas can be shared at a European acceleration scale, allowing knowledge exchange between key identified actors. This way, improvement areas are to be linked with the available acceleration services.

Furthermore, from a “business needs” point of view, it has been seen that the main demand and improvement suggestion are related to the ecosystem approach (building awareness and a more connected ecosystem) as well as establishing partnerships and to build more personalized support. It has also been observed that most of the programs are aimed at startups, being possibly necessary to increase the offer of services in more advanced stages of maturity. Similarly, the possibility of access to certain services is more limited and would benefit from further development.

The review of this investigation towards acceleration ecosystems and services reveals therefore the directions that the Food-scalEUp project can undertake and the main concern on which the consortium can focus. Overall, this work can be used by the partnership as a compass to empower acceleration services and to shape knowledge exchanges in WP2 “Connecting and engaging business acceleration stakeholders” and WP3 “Co-creating and piloting improved business acceleration services”.