Network for European Research
and Innovation acceleration in the US

Gap analysis, identification of synergies, and operational project roadmap

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Abstract: Results of the supply mapping and demand mapping is compared and analysed in order to identify gaps between the offer and demand, as well as potential synergies. The results of the gap analysis are coupled to activities planned in the operational roadmap. On this basis, recommendations are given on where and how to adapt NearUS services in order to constitute a sustainable offer in line with its market value.

Keywords: gap analysis; offer; demand; market research; synergies; services; roadmap

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Disclaimer

Executive Summary

This document gathers the findings of the analyses of the ‘offer’ and ‘demand’ sides, aiming at identifying the “gap” between both, serving as a stepping stone for better defining the future NearUS Network’s value propositions. Based on the different approaches taken within the offer analysis (elaborated on the basis of extensive desk research, an online survey and additional interviews), the demand analysis (building upon a survey towards potential users, desk research and additional interviews) and investigations on project services refinements, this gap analysis provides an overview of trends and further explores the axes of development to be considered by NearUS partners.

The NearUS mapping does not pretend to cover the whole set of service providers working with the US. That is why the NearUS offer and demand analysis are intended to provide an initial coherent overview of the market. NearUS pilot services will be implemented, market test will be done, lessons will be learnt, and the partners responsible for each service will then adapt the services and their business models accordingly, when required.

Analysis per services

While there is no obvious ‘gap’ for the set of services to be developed within the NearUS project, as foreseen by the project stakeholders, the added value could lie in its differentiated and adaptive approach towards potential EU customers for each of these services. The chapters in this analysis relating to the service offer specify the gap observed for each service. The good knowledge of partners on service activities will be of high value for calibrating the services in view of users’ actual needs.

Sectors-related conclusions

Overall, there is a very high demand – and an abundance of offers - in information and communication technologies. Interestingly, it seems like some of the most highly demanding potential customers, according to the demand analysis, are those involved in Human health and social work activities, Energy production and distribution and Manufacturing and industry. As such, NearUS should ensure that the services are open to a wide array of topics, including niche topics, and do not only focus on ICT/ tech-oriented stakeholders.

Geographical considerations

In the EU, countries with the biggest “service gap” identified, that is where the demand for support services in the US is high either in spite of existing support offers or because the offer is not sufficient, are Austria, Poland and Slovenia. Other countries with a high need for NearUS services are Germany, Ireland, Portugal, Spain, Belgium, Hungary, Romania and Bulgaria. Furthermore, it can be assumed that most other Eastern European and Baltic countries with no support service offers identified, however also low survey response rate, could potentially be target customers.

Linking with other initiatives

NearUS should further explore the potential collaborations with relevant stakeholders (such as EU initiatives, associated partners or local service providers) along the definition of its value proposition and keep an open approach towards additional stakeholders that could become potential partners. This would enable to alleviate certain potential ‘pains’ artificially created by a wrong assessment of NearUS as a “threat” by other service providers while NearUS intends to suggest partnerships and exploitation of synergies rather than competition.

Focus group and pilot actions should be pivotal for further confirming (or disconfirming) the trends identified through this document. Beyond correcting this analysis’ imperfections, these steps should further qualify the gaps identified and nourish NearUS business models’ definition.

The NearUS Project

Network for European Research and Innovation acceleration in the US

The NearUS initiative is establishing a Network of European Research and Innovation Centres throughout the United States. It acts as a central contact point for European research and innovation actors seeking to grow and reinforce collaboration across the Atlantic. The mission of the Network is to provide standardised as well as tailor-made, research & innovation internationalisation support services to European researchers and innovators, to accelerate access to the US market, and maximise chances of success. The initiative started in April 2017.

NearUS targets to serve the following actors:

- Accelerators
- Businesses
- Clusters
- Entrepreneurs
- Funding Agencies
- Incubators
- Networks
- R&D institutes and labs
- Research managers and administrators
- Research Parks
- SME's
- Start-ups
- Universities
- University Associations

The NearUS Network will include the following entities:

- **One "Coordination Node" in Europe** (at EBN)
- **One "Coordination Node" in the US** (at InBIA)
- **Two physical "Landing Hubs":**
  - **San Francisco Centre: NearUS West Coast Landing Hub at European American Entreprise Council**
  - **Boston Centre: NearUS East Coast Landing Hub at Cambridge Innovation Centre**
- **Five Associate Hubs across the US**, and plans to expand the NearUS Network beyond these first five Hubs, over four years.

The NearUS Network is built on local US experience and strong existing ties between the EU and US, while providing new researcher- and entrepreneur-serving capabilities which address the resource gaps necessary to enable access for all EU Member States and Associated Countries, as well as every state in the US.

A variety of services are proposed for researchers and entrepreneurs engaged by the Network during the pilot phase, then the Centres' pilot activities will be evaluated to inevitably retain the initiative's most successful components to ensure a sustainable plan for NearUS in the future.

Services will target various, commercially viable technology maturity levels (**Research2Research**, **Research2Market** and **Business2Business** stages) and will include research connection symposia, business matchmaking opportunities, working visits and innovation tours to US organisations to explore technology/product partnerships and/or business development middle / long term opportunities, pitching to potential investors, entrepreneurial bootcamps, work space access, hands on business acceleration programmes, and more. As the NearUS initiative is highly competitive to best serve the strongest researchers and entrepreneurs, all services must be applied for through an open and transparent selective mechanism.

60 associated partners in the EU and US support the NearUS Network, with more associated partners expected in the future.

NearUS Consortium:

Coordinator: German Aerospace Center (DLR), Germany

Partners:

- inno TSD, France
- European Business and Innovation Centre Network (EBN), Belgium
- International Business Innovation Association (InBIA), USA
- European American Enterprise Council (EAEC), USA
- INTRASOFT International (INTRA), Luxembourg
- Sociedade Portuguesa de Inovação (SPI), Portugal
- Regional Centre for Information and Scientific Development (RCISD), Hungary
- National Council of University Research Administrators (NCURA), USA

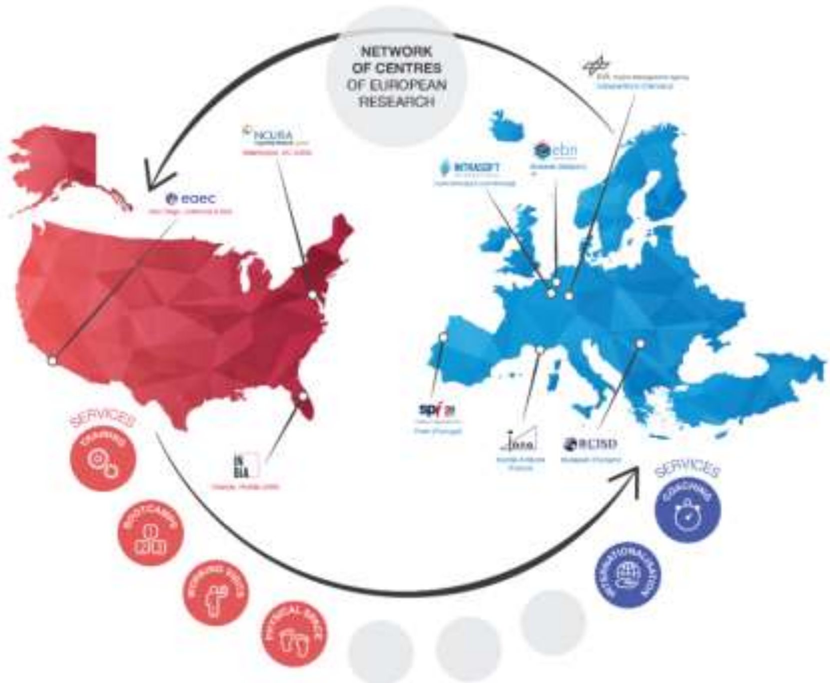

Figure 1: NearUS Network

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List of Abbreviations

Abbreviation	Explanation
AC	Associated Countries
B2B	Business-to-Business
CEBRABIC	Centre for Europe-Brazil Business Innovation Cooperation
DoA	Description of Action
ERICENA	European Research and Innovation Centre of Excellence in China
EU	European Union
H2020	Horizon 2020
JRC	Joint Research Centre
MS	Member States
R2M	Research-to-Market
R2R	Research-to-Research
R&D	Research & Development
R&I	Research & Innovation
ROI	Return on investments
SME	Small and Medium Enterprise
STI	Science, Technology and Innovation
US	United States of America
USP	Unique selling proposition

1 Introduction

NearUS, the H2020 initiative aiming at building up ENRICH - European Network of Research and Innovation Centres and Hubs - in the USA acts as a central contact point for European research and innovation actors seeking to grow and reinforce collaboration across the Atlantic. The NearUS initiative was launched with two other ("sister") projects, one targeting China (ERICENA)[1] and the other one targeting Brazil (CEBRABIC)[2].

NearUS aims at providing targeted services to European Research and Innovation (R&I) stakeholders aiming at collaborating with US counterparts and accessing the US market. A number of services were initially pre-defined during the NearUS initiative preparation, due to the sound experience of the project members.

In order to assess and quantify European R&I stakeholders' demand for the proposed support services in the US, and fine-tune the services based on the feedback from the potential customers, the NearUS initiative started with an in-depth market research. An online survey was jointly launched with the two "sister" projects and disseminated to over 10.000+ EU MS/ AC stakeholders from a variety of backgrounds. This survey served as the basis for the demand, as well as the offer analysis.

The following steps were part of the market research process:

1. Offer analysis: existing support service providers were identified based on extensive desk research, the online survey and additional interviews. The results along with potential synergies can be found in the report 'Mapping of existing tools and services/service providers[3].

2. Needs analysis: in order to assess the demand and latent needs of European stakeholders from the Research and Innovation community seeking for support to internationalise to the US, an online survey was launched and disseminated to over 10,000 European stakeholders. The in-depth analysis of the survey responses of the 318 EU R&I stakeholders that expressed interest in the US, as well as information retrieved through desk research and additional interviews can be found in the report 'Mapping of clients and their demands'[4].

3. Gap analysis: the results of supply mapping and demand mapping have been compared and analysed in this report in order to identify gaps between the offer and the demand. The results of the gap analysis have been compared to the activities initially planned in the project's Description of Action (DoA). On this basis, recommendations are given on where and how to adapt the project operational work plan (roadmap), notably with regards to the services, to be sure the NearUS offer is targeted to the demand of potential clients and can thus be established; the sustainability of these new services being a next step.

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[1] www.ericena.eu

[2] www.cebrabic.eu

[3] Available at: https://near-us.eu/newsroom/offer-analysis-mapping-existing-tools-and-services-well-service-providers

[4] Available at: https://near-us.eu/newsroom/mapping-nearus-clients-and-their-demands-0

In parallel, an operational NearUS project roadmap with a plan of activities has been prepared for the project duration, giving a working document revised when relevant, using a feedback loop from the NearUS Network of Centre(s) and based on its activities. It is an excel-file document which is aimed at serving as a guideline for the operational implementation and monitoring of activities. This file is not displayed in the public deliverable, but kept separately (and confidentially.

In the coming months, ‘pilot actions’ will enable NearUS partners to test out services through open calls, thus ensuring a refining of their formats. In parallel to these, two focus groups (in the EU and US) will take place, during which discussions over the value propositions and unique selling points will occur. At the end of these processes, an overall evaluation of NearUS Network and services shall be one of the final steps of their optimization.

2 Methodology

2.1 Offer & Needs analyses inputs

2.1.1 Main findings of the ‘Mapping of existing tools and services as well as service providers’

The offer analysis was based mainly on the information gathered through desktop research, a compilation of past research studies, the initial NearUS Survey, and an interview of 11 service providers. In the online survey, 161 respondents identified themselves as Europeans and three as Americans (in line with the targets aimed at). Through the desktop research mapping, 284 service providers were identified in total, out of which 157 are national entities of EU Member States, European organisations/networks and/or chambers of commerce etc.

Most of the service providers serve only their nationals in the US (e.g. a German service provider funded by German sources and based in the US serves German organisations) and do not serve Europe as one single entity. A lack of collaborations and synergies between these stakeholders was thus identified.

Moreover, the Western and Northern EU countries, which are in average stronger in innovation output, often promote their local companies and start-ups while trying to boost US investments in their respective countries. The ones on the losing side could be those who cannot afford a formal presence in the US, and even less on the West Coast. This could be relevant for some Southern EU states. Spain is relying lately more on service providers or on regional initiatives; Greece is not represented; Eastern European and Baltic countries are in even more difficulties: countries like Bulgaria, Croatia, Lithuania, Estonia, Slovenia, and Latvia have little presence. The grouping of four Eastern countries called Visegrad (Czech Republic, Slovakia, Poland, and Hungary) and their joint efforts to be represented as one cohesive group is prospective.

Another important finding is that service providers tend to offer their services to whoever is interested, or have the services research-oriented or business-oriented, and not work with predefined categories as it was outlined in the initial NearUS planning, i.e. Research-to-Research (R2R), Research-to-Market (R2M) and Business-to-Business (B2B).

The services most offered by the service providers analysed were ‘networking’, ‘organisation of activities’ and ‘information services’. From the 284 service providers mapped, 220 offer networking, 189 organisations of events and 144 information services – more than half of the entities that have been analysed.

It should be noted that NearUS mapping does not pretend to cover the whole set of service providers working with the US. That is why the NearUS offer and demand analysis are intended to provide an initial coherent overview of the market. NearUS pilot services will be implemented, market test will be done, lessons will be learnt, and the partners responsible for each service will then adapt the services and their business models accordingly, when required.

2.1.2 Main findings of the 'Mapping of clients and their demands'

The objective of the 'demand analysis' was to identify and quantify the demand of European stakeholders from the Research and Innovation (R&I) community seeking support to internationalise to the US. The analysis was largely based on the findings of the online survey, as well as 15 additional interviews. In total, 318 survey respondents expressed interest for support in the US.

Overall, the in-depth analysis of the survey data and interview answers showed a generally high interest towards collaboration with the US amongst European R&I stakeholders, as well as towards the proposed NearUS services.

There were generally more survey respondents from research type of organisations and universities than from business background. There was a high response rate from Germany and Austria amongst other Western European countries, as well as from Eastern European Member States. Regarding the thematic areas of interest, most frequently respondents were involved in "Information and Communication Technologies", followed by "Human health and social work activities" (notably medical services), "Energy production and distribution" and "Manufacturing and industry".

64% of the respondents of the survey identified R2R as their strand of interest, in line with the fact that much more research organisations answered the needs analysis comparing with business organisations. The most demanded service in this strand was 'Research connection symposia', followed by 'Working visits' and 'Matchmaking events', all three being mainly required quite promptly by respondents.

60% of the respondents identified R2M as their strand of interest. This correlates with the high number of respondents from the research sector. Most of the services in the R2M strand were initially designed by US partners for already established start-ups spin-offs, or stakeholders nearing this state. However, it became clear that most of such organisations considered their strand to be 'B2B' rather than 'R2M' in the survey. This leads to the presumption that there is a semantical issue between EU and US stakeholders. Survey respondents, having been in majority EU R&I stakeholders, considered the R2M strand rather being addressed to "researchers who later on wish to become entrepreneurs in the US". Moreover, it seemed as if most respondents in this stream were not quite ready to expand internationally, or at least could not right away invest their time and money towards travelling to the US or participating in face-to-face events. On the contrary, they seemed to have a preference for online/digital guidelines and education tools.

34% of the respondents of the survey identified B2B as their strand of preference. Unlike the two other strands, 47% of the respondents were private organisations. The most demanded service in this strand was 'Matchmaking events', followed by 'Innovation Tours' and 'Business acceleration programme'. These stakeholders who felt were not being served by their local service providers or government bodies generally expressed that they wanted to get access to services right-away and were ready to invest. In general, face-to-face events were ranked higher than digital tools.

2.2 Gap analysis approach

The aim of the gap analysis is to compare relevant findings from the "offer" and the "demand" analyses and to identify the potential gaps between the two. As both previous analyses, the gap analysis is also set up with the service-based structure – with the aim to identify the gaps on the services that NearUS is planning to provide. In addition, gaps on sector- and geography are analysed in Section 3.2, as well as further considerations, such as the NearUS value proposition and potential synergies with other initiatives.

One of the results of the offer and the needs analysis coincided in one main recommendation: they both observe a lack of clarity with regards to what was defined as the "Research to Market" strand in NearUS. Therefore, the pre-defined NearUS services designed for this strand are suggested to be revised, or, at least an explanation shall be added in the pilot call texts and service description, clarifying to the potential applicants the target group for the R2M services with selection criteria. This aspect is taken up in this gap analysis and reflected in the structure and content of this document. The gap analysis' structure suggests these services to be well explained or split into two main categories based on the customers' objectives: research-orientation vs business-/market-orientation. This issue should be further discussed during the first focus group of NearUS for confirming this observation.

For each service pre-defined for NearUS, the "offer" side (comparable services provided by other organisations in the US) will be compared with the "demand side" in order to identify service-related gaps.

The structure for the proposed services is outlined below and is used in Chapter 3.

Table 1: Reseach-oriented services

Research-oriented Services
Target customers: Representatives of research organisations, universities, etc. who look for research-related collaboration opportunities in the US
> **Research Connection Symposia *and research matchmaking component*** > **Working visits** > **Work Space for Researchers** > **Thematic Research Studies** > **Digital tools for Researchers** > **Training Events for Researchers** ______________________ *Potential research-oriented pilot actions to be additionally investigated during NearUS project* > ***IPR support service***

Table 2: Business/ market-oriented services

Business/ market-oriented Services
Target customers: Start-ups, Spin-offs, SMEs (from both, research and business background) with the aim to internationalise/enter the US market
> **Business Acceleration Programme** > **Innovation Tours** > **Boot Camps** > **Matchmaking & Pitching events** > **Work space for businesses** > **Media Promotion Service for businesses** > **Innovation/Market studies** > **Business-/Market-related Digital tools**

> **Business-/Market-related Training Events**

3 Gap analysis and recommendations

3.1 Service related gaps

The objective of the analyses per services below is to provide demand-driven services to beneficiaries and clients of the Network/Centres. For each service the original NearUS action plan, as pre-defined by the NearUS project plan, has been provided, followed by the main conclusions from the demand and offer analysis, and finally the identified gap and recommendations for the operational roadmap highlighted in a yellow box.

3.1.1 Research to Market (R2M) services' redistribution

In the NearUS survey, 60% of the respondents interested in the US (190 out of 318) identified R2M as their strand of interest.

This strand has however a major "semantic drawback" that impacts on its framing and associated developments. Research2Market "sits" between Research and Business, thus encompassing stakeholders who were found to mainly identify themselves as one of these two latter. It should be noted that the definition of R2M given in the online survey was possibly not understood by all respondents; also, throughout the whole analysis on the offer and on the demand side, it became clear that the understanding of "what is R2M and who is it addressed to" was not at all the same in the US and in the EU.

In the offer analysis, it was found that the R2M "frontier" is not very defined amongst service providers of US origin - out of the 34 US organisations providing services to R2M, only 2 are working exclusively for this strand. 15 organisations are providing to R2R and R2M, 9 organisations are providing to R2M and B2B, and 8 organisations are providing services to the three strands. The situation is similar for service providers of EU origin - There are 24 European service providers covered by the analysis that support European researchers accessing the US market. However, only three of them work only with R2M, while 15 support all three strands, 2 support R2R and R2M and 4 R2M and B2B.

Similar results were found based on the demand analysis: it seems like respondents identified themselves with two rather than three strands: out of the 23 SMEs that marked R2M as their strand of interest, 19 also marked B2B. Similarly, out of the 82 Research organisations that marked R2M, 75 also marked R2R, while only 20 marked B2B. Out of 77 universities interested in R2M, 68 also marked R2R, while only 10 marked B2B. This suggests that in many cases respondents either chose R2R and R2M or R2M and B2B strands. Therefore, it has been considered useful to sort the services in two rather than three strands, based on the goal of the stakeholders rather than their profiles: research vs. market/business oriented services.

It has also become clear from the demand analysis that the R2M strand was selected mostly by stakeholders from research organisations and universities (who also selected the R2R strand) that are not yet in the state of commercialisation, while start-up and spin-off type of respondents considered "their" strand to be mainly Business-to-Business. Out of the 190 respondents in this strand about 40% marked themselves as research organisations/ universities, while 12% marked themselves as SMEs. Nonetheless, Research2Market services, mainly the face-to-face services, such as the Innovation Tours and Boot camps are originally targeted at EU R&I actors that are already in the process of commercialising innovative EU research, such as spin-offs. Furthermore, most survey and interview respondents in the R2M strand signalled that they are not ready to expand internationally immediately, or at least do not seem ready to confer time and money for such a move. Therefore, it is suggested to offer such services to already established research-intensive start-ups, and integrate them with the similar B2B services for start-ups and businesses.

However, the service list in NearUS is not fixed, it might evolve depending on the further findings, interactions with customers and partners. It is recommended to have in-depth discussions with the first customers who are interested in R2M-related services – firstly during Focus Groups and secondly during pilot services, to investigate whether they are interested in additional R2M-related services, such as IP support, licensing, etc. Should prime customers be interested in such services, these would be explored in the pilot actions and be implemented and possibly developed in the future by the Network.

As said before, the definition of R2M did not seem clear and it became obvious that the service-outline of the R2M strand by US partners corresponds rather well to the definition generally shared in the US: these services where targeting established enterprises (research-intensive start-ups). However, the survey respondents having been in majority EU R&I stakeholders, they considered the R2M strand rather as “address to researchers who wish to become entrepreneurs in the US”. This clearly explains the fact that research-type organisations showed interest in this strand, however start-ups rather selected the B2B strand services.

Accordingly, and in order to elaborate an offer which will be clear to clients, whether they are from EU or US origin, Research- vs Market-/Business-oriented services could be a better distinction, leaving R2M out in the terminology. **The services previously identified as R2M are suggested to be integrated into business/market-oriented services, thus rationalising communication while keeping the target groups foreseen in mind.**

For the facilitation of the gap analysis, this has been implemented in this report. The R2M survey responses for the face-to-face services targeted at business type of stakeholders in the process of commercialisation have been generally merged with the B2B services, while the analysis of the survey results for most information/training type of services have been merged with R2R, as the respondents’ profile (mostly researchers who responded to both, the R2R & R2M strands) and the demand for the services were very similar for these services for the R2R and R2M strands, while B2B results differed.

3.1.2 Research-oriented Services

Research Connection Symposium

Service as pre-defined by NearUS:

The aim of the NearUS “Research Connection Symposium” service is to organise three symposia to be held (one per year) back-to-back with bigger events (e.g. NCURA annual event, scientific conferences) with up to 20 EU researchers and research managers selected to meet US researchers to collaborate on the prospect for joint research endeavours. Each symposium will feature thematic sessions, including around some H2020 thematic work programmes where EU researchers present their work and define their research needs to the potential US partners. Sufficient networking opportunities will be ensured through these side events.

Conclusions from the demand analysis:

In the demand analysis, the respondents considered the Research Connection Symposium and other large-scale networking opportunities as the most popular R2R service. The majority of the respondents are from the public sector, working in research organisations and universities. Thus, the format of the service, notably its billing process, needs to be considered.

Regarding the frequency of the service, the results are balanced, the most popular answer being “twice a year”, followed by “on a continuous basis”. Thus, the long-term demand for this may depend on how the service is formatted so that, if not the service, the relationship with the “customer” is continuous over time. For the desired frequency of the service, the respondents considered that they would like to get access to the service as soon as possible, in the next 2 to 5 years or still this first year, which also suggests a very high demand for this R2R service.

Conclusions from the offer analysis

From the supply side, both from the survey and the mapping developed, there is not a concrete service that focuses specifically on research like the Research Connection Symposium. Within this context, services of networking are considered for the analysis, as it includes to a certain extent (but not exclusively) some of the Research Connection Symposium offer. Taking this into account, 47 survey respondents offer the service “Networking: primary contacts, communication, information exchange, structural access to relevant data, etc.”, the second most offered service in the R2R strand. According to the survey’s respondents, this service is mostly provided free-of-charge. According to the survey, some research organisations / institutes and universities themselves provide this kind of service.

In terms of the mapping exercise, 23 organisations that provide networking services to researchers were identified. The types of organisations that provide this service seem to be mainly governmental, non-profit organisations and research centres / institutes. The mapping results seem to indicate there is a wide range of sectors from service providers involved in networking services related to researchers.

Identified Gap: Taking into account the demand analysis, there is a very high need for the Research Connection Symposium service. The analysis showed that there is a need for the service to be tailored in the frame of a “continuous” customer service. The analysis also showed that combining the Research Connection Symposium and the matchmaking event would be beneficial for the potential clients.

On the supply side, and according to the mapping sample, there seems to be several organisations from EU MS/AC and US that provide this service. From the EU side, the majority of service providers at the EU level seem to be located in central Europe.

This gives room for the NearUS Research Connection Symposium to cover other European regions that do not have direct representation in the US and in the EU. In addition, there is a very high demand for this service in R2R, which suggests that there is an opportunity to meet this demand through the NearUS Research Connection Symposium service, which is not directly reflected in the offer side – the analysis was developed taking into account the “networking service”.

Matchmaking and Connecting Events during Research Connection Symposiums

Service as pre-defined by NearUS:

The aim of the NearUS "Matchmaking Events" service is to support EU researchers and entrepreneurs that are looking for partnering and investment opportunities in the US by connecting them through matchmaking or connecting events.

Conclusions from the demand analysis:

Taking into consideration the survey results of the demand analysis, there is a high level of interest (ranking third) in such service. In terms of thematic areas, organisations interested are mostly involved in ICT and human health activities. Both the matchmaking events and the Research Connection Symposium services have presented identical levels of interest from potential client organisations. Thus, combining these two services should be considered as an option as matchmaking services are considered to be business-oriented. Within this context, the "Research Connection Symposium" should include the activities perceived under the matchmaking research-oriented service.

Regarding the desired frequency of the service, half of the respondents considered the matchmaking events should be organised either once or twice a year. In addition, more than half of the respondents considered the service should be available as soon as possible, suggesting there is a high demand for this service to become available in a short period. It is also important to note that a quarter of the respondents is already active in the US, which is an important aspect when considering travel costs to such events.

Conclusions from the offer analysis

41 organisations answered the online survey as having services similar to matchmaking events. Just over half of these organisations provide this service free-of-charge (18); while the remaining charge a fee (16). The types of organisations providing this service are largely research organisations or institutes, followed by universities. In addition, there are other types of organisations that provide this service, such as incubators, clusters and research funding agencies. It is interesting to note that there are 550 EU organisations in the EEN and EEN organises the majority of the matchmaking events in Europe. In terms of geographical location, the service providers that offer this service (and answered the survey) are widely dispersed throughout Europe with service providers identified from most member states. Furthermore, two service providers from the US were identified. Once again, this is a sample that shows trends. However, the NearUS partners that are responsible for developing the service concept are recommended to take into account the data on EU and US matchmaking event professionals (ex. BIO International Convention) and their offer when developing the business model for the services. Moreover, after the first market test, NearUS will further analyse the other providers and its service offer positioning together with potential users. This will be done in events organised under the project.

According to the mapping developed, the lack of organisations that provide services for R2R matchmaking shows a service gap that may be filled, through the Reseach Connection Symposia for its R2R component. However, the mapping developed shows the matchmaking service is mainly requested for B2B purposes, the majority of mapped service providers being governmental or private organisations, e.g. German Accelerator Tech, FinPro Silicon Valley, Research and Innovation Network Austria (RINA) and swissnex.

Identified Gap: Taking into account the demand analysis, there is a high need for matchmaking services amongst research networks. These potential clients are interested in the opportunity to attend matchmaking events, which should act as a continuous customer service offer – one to two times a year. The analysis also shows combining the Research Connection Symposium and the matchmaking event would be beneficial for the potential research-oriented clients.

In addition, one may have difficulty distinguishing the difference between these two types of services regarding their targets. Thus, it could be beneficial to set Research Connection Symposia as the matchmaking /connecting events for the researchers, while market and business oriented matchmaking services remain a proper business-oriented service (see 3.1.3 section).

Regarding the supply side, the analysis shows that there seems to be very few organisations from EU MS/AC and US that provide research-oriented symposia/ research oriented matchmaking services in the US. The analysis also shows there are already service providers that develop matchmaking missions for B2B in thematic areas such as ICT and human health, which were the two areas that ranked higher from the needs side (as further developed in the next sections of this document).

Working visits

Service as pre-defined by NearUS:

The aim of the NearUS "Working visits" service is to organise three one-week working visits to the US, each targeting a different area of research. Each visit will consist of up to five EU specialists (15 in total for the three visits) who are highly interested in establishing a long-term collaboration with US. The visits may be paired up with the US exploration / Innovation Tours in WT3.3. EU and US research organisations selected for the working visits will need to present in advance an implementation plan for long-term collaboration. This will be organised in synergy with other initiatives such as the BILAT USA 4.0 project, the format being discussed between the two initiatives.

Conclusions from the demand analysis:

Taking into consideration the survey results of the demand analysis, there is a very high level of interest (ranking second) in such service within the R2R strand. The distribution of the organisation's sector and type is in line with the R2R general statistics, i.e., interest comes mainly from research organisations from the ICT and human health areas. In terms of frequency and timing of the working visits, the answers are somewhat diverse. However, one third of respondents considers that the working visits for R2R should occur twice a year. In addition, one third of the respondents considered the service should be available as soon as possible. On the other hand, also a third of the respondents prefer to have access to the service in the next 2 to 5 years.

Conclusions from the offer analysis

In total, 51 organisations were identified through the online survey and mapping as offering the service "Host sabbaticals/visiting lecturer/research working visits for specialists". In terms of the survey respondents, the majority of the organisations offer this service free-of-charge (inducing an indirect support), while the remaining charge a fee. The types of organisations providing this service include research organisations / institutes and universities.

Regarding the organisations identified through the mapping, the working visits service is to a certain extent (but not exclusively) included in the exploration trips offer. According to the mapping developed, the exploration tours are not in the top 10 of services offered, meaning that there seems to be an opportunity to establish this service for research-oriented targets. Institutions such as the Innovation Norway San Francisco, the European American Enterprise Council and the CNRS Offices Abroad provide this type of service.

Identified Gap: According to the demand analysis, there is a need for the development of working visits for research organisations/ institutes, universities and SMEs from the ICT and human health areas. This service should be part of a continuous customer service offer with twice a year occurrence.

For the supply side, the survey shows that there is a relatively high offer from the respondents for hosting sabbaticals, visiting lecturers or research working visits for specialists who are highly interested in establishing a long-term collaboration with the US.

However, the mapping developed shows that there is a potential gap in the service offer towards the R2R strand when compared with the B2B strand. Within this context, the NearUS Working Visits offer should focus on research-oriented services, where there seems to be a lack of service providers in comparison with B2B services.

The diversity of answers underlines the need to clearly define contents with potential stakeholders as a learning approach, namely through pilot actions.

IPR support service

Service as pre-defined by NearUS:

The IPR Support Service was not foreseen in the NearUS primary work plan.

Conclusions from the demand analysis:

Taking into consideration the survey results of the demand analysis, there is a moderate interest in such service. In total, 67 respondents showed interest in this service, named “Access to U.S. based intellectual property assets from research institutions for potential acquisition of new IP and/or potential licensing of European technologies out to U.S. entities”. In particular, there is a relatively high amount of research organisations interested in this service. Regarding the desired frequency and timing of the service, respondents expressed very diverse opinions. It is also worth mentioning that many of the respondents already have activities in the US.

Conclusions from the offer analysis

In terms of the supply side, both surveys’ replies and the mapping do not directly reflect the offer available for this service. In this sense, the offer comparable with the IPR Support Service in the online survey is the “Advice and support on internationalisation: guiding material, events, understanding the respective R&I&B landscape”, which may provide IPR support. Within this context, the majority of the service providers provide free-of-charge services; while less than half provide a charged service. In terms of types of stakeholders providing this service, these seem to be mainly research organisations or institutes, followed by universities. In terms of geographical location, there are service providers located in most if not all member states and the US as shown by the survey sample.

Regarding the mapping, the IPR Support Service is considered to be to a certain extent reflected in the information services offer (which could include IPR support information and actions). Within this context, 21 service providers were mapped for offering information services for R2R, which included instruments to create awareness regarding policy and funding opportunities. The majority of mapped service providers are governmental institutions, e.g. German Federal Ministry for Education and Research (BMBF), German Research Foundation (DFG), The Netherlands Organisation for Scientific Research (NWO) and swissnex.

It is also important to note that according to the analysis developed no legal and IPR support seems to be offered by EU representation offices.

Identified Gap: Taking into account the demand analysis, there is a moderate interest for IPR Support Services. However, there is a relatively high number of research organisations interested in this service, particularly for ICT, human health and energy production. In this sense, the results suggest that this service may not be a priority for the respondents, or that they are not sure how they want to take advantage of this service due to the apparent moderate interest shown. For the supply side, and according to the survey and mapping developed, there seems to not be a concrete offer of IPR Support Services for R2R activities.

This apparent lack of available IPR services may suggest a gap for the NearUS “IPR Support Service” to fill. The misunderstanding of what is entailed within “IPR Support Service” as indicated by the survey results suggests further defining or renaming of the service might be needed to attract potential clients. Also, another option to consider would be to integrate IPR issues specific to the US within the thematic studies developed. For example, each study could include IPR issues or one edition could focus on this topic.

Work Space for Researchers

Service as pre-defined by NearUS:

The aim of the NearUS “Work Space for Researchers” service is to provide work space, infrastructure and secondment opportunities to private and public European organisations going to the US and seeking a landing hub (Centre or Associated Centre of the Network) directly in the right eco-system suitable to their needs.

Conclusions from the demand analysis:

Regarding the survey results of the demand analysis, there is a moderate interest in accessing this service. This interest comes mainly from organisations that are active in ICT and human health areas. In particular to the R2R strand, there is a high level of interest from organisations focusing on public administration, security and defence in comparison with its ranking in the general statistics (ranked 5th in this service while in the general statistics it ranked 10th). For the R2M strand statistics, it is relevant to note that there is a high response rate from Hungary.

In terms of service frequency, the results suggested that most respondents are interested in gaining access to work space and infrastructure several times a year and not continuously. Thus, the demand associated to this service is to be considered in the long run. The service should be formatted so that there is a continuous relation with the potential client for answering the client’s needs and ensuring the service throughout time. In addition, one third of the respondents considered that the service should be available as soon as possible. On the other hand, also a third of the respondents prefer to have access to the service in the next 2 to 5 years. Concerning the geographical location of the work space, the respondents are evenly divided between the West Coast and the East Coast; while the majority of the respondents consider that the location does not matter.

It also shall be noticed that researchers coming to the US, are usually looking for the location at campus at their hosting university, and it is possible that the NearUS Centres/Landing Hub are not available at that hosting university. NearUS can offer this service only at its Centres/Associated Hubs. As such, this service should be experimented during the first call for pilot actions and its format (notably considering travel expenses) further investigated during the project.

Conclusions from the offer analysis

From the supply side, a total of 29 providers supporting R2R services and 23 providers supporting R2M services were identified through the online survey. 26 organisations related to R2R and R2M were identified through the mapping. Regarding the service providers identified through the online survey for both strands, most charge a fee for the service, while some of the respondents indicated offering it free-of-charge. (thus, probably being indirectly funded through relevant government funding agencies – but this wasn't captured by the survey). In terms of types of organisations, most of them are largely research organisations / institutes, followed by universities and incubators. Concerning the mapped organisations for R2R and R2M, these are mainly accelerators and research centres / institutes. The mapping also indicated that the majority of mapped service providers seem to be based in the state of California, e.g. California Institute for Regenerative Medicine, Innovation Norway San Francisco and IdeaLab. It is also worthwhile to note, the example of Innovation Village, which is a research park that is a part of Cal Poly Pomona University.

Identified Gap: In regard to the demand analysis, there is a moderate need for such service in a very short notice or in the next two years. In addition, the potential clients showed interest that this service be provided in the long-run. Concerning the geographical position of the work space, the respondents do not seem to have any particular preference in terms of location in the US.

On the supply side, it is noticeable that this service has been offered a lot for all three strands. However, it appears that the service suppliers offer this service much more oriented towards B2B activities rather than research – most probably for the same reason: the researchers coming to the US usually have work space at the hosting lab/university.

Within this context, the focus of the NearUS Working Space on the researchers target group shall be further investigated – NearUS can offer workspace for researchers at the NearUS Centres/Landing Hubs, and then the concrete demand from the researchers is to be assessed. Also, should the service be developed, its sustainability plan would have to be scrutinized, notably with regard to its format and associated costs / revenues schemes.

In terms of geographical location of the service providers, these seem to be located mainly in the state of California. However, the demand analysis showed that the potential clients do not have any particular preference for the working space location in the US, which may also suggest an opportunity for offering the service in different regions of the US.

Thematic Research Studies

Service as pre-defined by NearUS:

The aim of the NearUS "Thematic Research Studies" service is to develop study reports that will identify key players based on a set of criteria (e.g. via bibliometric studies incl. field related citations, international collaborative experience) determine relevant conferences and other knowledge exchange and networking events and identify regional thematic hot spots or clusters of interest. This service will comprise actions perceived both by the R2R and R2M strands.

Conclusions from the demand analysis:

Based on the survey results on the demand analysis, there is a relatively high need for such service (named as “Guidelines and information on the US-research landscape, list of key-contacts, etc. facilitating collaboration with US counterparts”) in the R2R strand. In terms of level of interest, almost half of the survey respondents considered to be largely interested in this service, which shows the high demand for this. In terms of sectors, more than half of the respondents that are interested in this service are involved in fields related to human health. Regarding the desired frequency of the service, 60% of the respondents considered that they would like to get access to the service as soon as possible or still this first year, which also suggests a high demand for this service from research and innovation stakeholders.

In terms of the R2M strand, the thematic research studies were considered the most popular service. The statistics regarding the respondents’ profile were completely in line with the R2M strand statistics, namely in terms of thematic areas of interest – ICT, human health and energy production and distributions as the main ones. In terms of profiles, the majority are public organisations and universities, followed by non-profit organisations and a few private-sector organisations. According to the analysis, this service should be seen as a “loss leader” product[5] and has the same sectorial distribution as the R2R strand. In addition, it was noted that the studies could tackle research & innovation areas, including IPR matters, funding opportunities and business creation elements.

Conclusions from the offer analysis

On the supply side, 35 entities were identified through the online survey as offering the service of “Advice and support on internationalisation: guiding material, events, understanding the respective R&I&B landscape”. The majority of the service providers that responded to the survey provide a free-of-charge service, while less than half provide a charged service. Research organisations or institutes and universities are among the types of stakeholders that provide this service.

In terms of the mapping developed, the thematic research studies are to a certain extent (but not exclusively) included in the information services’ offer. Within this context, 21 service providers were mapped for offering information services for R2R, which included instruments to create awareness regarding policy and funding opportunities. The mapping also considers the majority of mapped service providers as governmental institutions, e.g. German Federal Ministry for Education and Research (BMBF), German Research Foundation (DFG), The Netherlands Organisation for Scientific Research (NWO) and swissnex among others.

Identified Gap: Taking into account the demand analysis, there is a relatively high need for such service in a very short notice. These potential clients are interested in these analysis/studies to be sector focused, being that ICT, human health and energy were considered the sectors to be privileged. According to the survey, the stakeholders demanding these services are mainly public organisations and universities, as well as non-profit organisations. In addition, it was noted that these studies should include content related with

[5] Product or service at a price that is not profitable but is sold or offered in order to attract new customers or to sell additional products and services to those customers (Investopedia).

research and business contacts and funding opportunities. On the supply side, the majority of the service providers seem to be mainly from EU MS/AC and some US organisations.

Within this context, the majority of service providers at the EU level seem to be located in central and southern Europe, which gives room for the NearUS service to be focused or disseminated through other European regions where there may be a lack of service providers, such as eastern Europe, as long as the content is sufficiently differentiated. Furthermore, mapped organisations offered information services mainly related with policy and funding opportunities. This gives room for the NearUS services/studies to focus on topics such as IPR matters and business creation elements, meeting the demand for services resulting from the survey analysis.

Digital tools for Researchers

Service as pre-defined by NearUS:

The aim of the NearUS "Digital Tools" service is to provide a set of digital tools to researchers that directly support the needs of the EU organisations, complementing the services to be implemented by the Network/Centres. In particular, this service is composed of three sub-services:

- Online education modules: a total of 6 online modules that will be available through the centre's website. Each module will be composed of a set of flashcards (20-25 flashcards per module) that summarize sector specific market entry issues as well as how to establish R2R collaborations. The module landing page (in the web site) will include a short description of the module and its objectives.
- Webinars: a total of eight webinars focusing on the research thematic and innovation-market studies and on the challenges regarding the client's needs and demands
- First Aid Information Kits: a 6 pages flyer, with the front and back pages as non-content pages (4 content pages). A total of 2 First Aid Kits will be developed during the project lifetime, focusing on two groups (research-oriented and business/market-oriented).

Considering the similarity of services, the Step-by-step navigation for Researchers is considered as part of the Digital Tools for Researchers analysis and should be merged into this service. The Step-by-step navigation is a webpage (on Network/Centres' website) that provides information on available resources to assess US regional research landscapes or markets, identify potential partners (research- or business- / market- oriented), etc. This should be separated into two categories: research-oriented and business/market- oriented). The step-by-step navigation page would also include an online quiz that can provide a diagnostic on the organisation's readiness to enter the US environment or to collaborate on RDI.

Conclusions from the demand analysis:

Based on the survey results on the demand analysis, there is a relatively high interest for the digital tools for researchers, mainly from public or government owned organisations. The survey showed there is more interest amongst research type of stakeholders than businesses, which is also reflected in the ranking position of the service. Most organisations are involved in ICT, human health and energy production related fields. In terms of desired timing and frequency of this service, most respondents would like to use it as soon as possible/this year and on a continuous basis. The interest in the three subservices is almost equivalent. 55% of respondents are highly interested (level 4 or 5) in first-aid information kits, most of them want to get access either as soon as possible or this year and 26% want to use it on a continuous basis. 49% rated the webinars as level 4 or 5, again most want to get access to it very soon, and 21% would like to use it several times a year. 51% rated online education modules as a level 4 or 5, being that most respondents need it very soon and 21% would like to use it on a continuous basis.

Regarding the step-by-step navigation, there is a relatively high demand in both the R2R and R2M strands for the "Step-by-step navigation for researchers" service. The service is considered to be transversal between the three strands. In terms of types of organisations interested in this service, these are mainly research organisations / institutes, as well as universities, from the fields of ICT and human health – as in the general statistics.

Conclusions from the offer analysis

On the supply side, the "Digital Tools" service are to a certain extent (but not exclusively) included in the communication and information exchange. Within this context, 49 service providers offer the service for communication and information exchange for research and innovation stakeholders. Most of the service providers offer this service free-of-charge, while a small number charge for this service.

In addition, 15 entities that provide research-oriented information services were identified through the mapping, although these are not forcibly all digital, but this is the closest service identified on the offer side. The types of organisations that provide these services include governmental and non-profit organisations and networks.

Regarding the offer side for the step-by-step service, both the survey replies and the mapping do not directly reflect the offer available. In this sense, the offer comparable with the step-by-step navigation for researchers in the mapping is considered within "Advice and support on internationalisation: guiding material, events, understanding the respective R&I&B landscape". As described in other services, the majority of the service providers offer free-of-charge services, while less than half provide a charged service. In terms of types of stakeholders providing this service, these seem to be mainly research organisations or institutes, followed by universities.

Identified Gap: Based on the demand analysis, there is a relatively high interest for the digital tools service amongst public and government owned organisations. The interest in the three subservices is almost equivalent and is considered to be transversal to all three strands. For the first-aid information kits, most respondents want to get access to the service either as soon as possible or this year, and on a continuous basis. Regarding the webinars, most of the potential clients want to get access to it very soon, and use it several times a year. For the online education modules, most respondents need it very soon and would like to use it on a continuous basis.

On the supply side, mapped organisations offered services related with policy and funding opportunities. According to the mapping and survey developed, there is not a service offer that includes the three sub-services (online education modules, webinars and first aid information kits), but these are somewhat included in other services such as information services. This potentially gives room to the NearUS service to provide digital tools (such as webinars, navigation tools and first-aid kits) that are not clearly available according to the mapping and survey developed.

Within this context, the NearUS service should consider that the offer is provided as soon as possible and ensure the contents developed are in line with the gaps identified and feedbacks from the services' users. In terms of the step-by-step navigation, there is a relatively high need for researchers amongst research organisations / institutes and universities. For the supply side, and according to the survey and mapping developed, there is not a concrete offer of step-by-step navigation for researchers. This apparent lack of available supply services may suggest a gap for the NearUS step-by-step navigation for researchers to address, due to the high interest shown by the respondents on the needs side. Within this context, further explanation or renaming of the NearUS service might be an option to attract new potential clients. In addition, there is also a need to examine the possibility of keeping separate strands (research-oriented and business-/market- oriented) for providing this service.

Training Events for Researchers

Service as pre-defined by NearUS:

The aim of the NearUS "Training Events for Researchers" service is to organise 15 training events across Europe focusing on the topic of "How to internationalise with the US". Each event should target around 30 participants. Some of the events might be linked with joint roadshows or back-to-back with other events. This will be decided in the implementation phase. A focus will be set on MS/AC that do not have R&I representations in the US. NearUS will seek synergies and complementarities with other internationalisation programmes and events offered by national and regional organisations, such as Trade Promotion Agencies and Cluster Agencies.

Conclusions from the demand analysis:

Based on the survey results of the demand analysis, there is a moderate interest from the R2R and R2M strands in such support service, mainly from public or government owned organisations, such as research organisations / institutes and universities. Many organisations are also active in water supply related fields and public administration, security and defence.

In terms of timing, the majority of the respondents would like to take part in training events several times a year and start as soon as possible or this year. Regarding the location, 43% would like the training events to take place in Europe; while 34% would prefer that the training events take place in both the EU and the US. Most (45%) of the respondents are willing to pay between 200€ and 400€ per training event; while 15% are willing to pay between 401€ and 600€. In addition, the majority of respondents signalled that they would like to meet regional stakeholders in matchmaking events. This notion could notably be of interest for partners in charge of trainings on the European side, in their definition of the training format, by including local / regional speakers in these events.

Conclusions from the offer analysis

Regarding the supply side, the survey replies do not directly reflect the offer available for this service. In this sense, the offer comparable with the "Training Events for Researchers" in the online survey is considered within "Communication and information exchange". This service is mostly provided free-of-charge by the organisations that responded to the survey, which include research organisations / institutes, research funding agencies and SMEs.

In terms of the mapping, 24 mapped organisations provide research-oriented education/training on the US side. The providers are mainly research centres / institutes, but also governmental and non-profit organisations. The majority located in the US are from the State of California, among which, SCANCOR, UC Davis Research, NASA Research Park are notable stakeholders. Of the organisations mapped on the EU side, education/training is provided by 16 organisations on the R2R strand and 12 organisations on the R2M strand. In particular, the Polish-American Internship Initiative (PAII), similar to an Erasmus programme, provides internships and practical training for Polish academics to be hosted in American companies during a period of 2 to 3 months. The participants have the opportunity to apply their knowledge in practice within the US hosting company.

Identified Gap: Taking into account the demand analysis, there is a moderate need for training events amongst research oriented organisations. There is a clear preference for holding these events in the EU, while very little respondents chose in the US. There was also a very high interest in meeting regional stakeholders in matchmaking events aside these events, thus outlining that regional involvement, for example through regional speakers, is essential for answering to the respondents' needs. Intermediaries such as Chambers of Commerce, Clusters, Accelerators, etc. should be involved in the planning process. On the offer side, there seems to be a high number of entities that provide services related with education and training (about half of the total entities).

From the mapping developed, education and training appear to be among the top five services offered by both EU MS/AC and US providers for the research and innovation stakeholders. According to the analysis developed, there is a need from the potential clients to have training sessions combined with other matchmaking events (for example, as parallel or side sessions within a matchmaking tour organised by another organisation, at least in the EU) which should be addressed by the NearUS services. The price offer should be considered – most respondents are willing to pay between 200€ and 400€ per training. This should be taken into consideration in order to establish a price that could be competitive.

3.1.3 Business/Market-oriented services

Business Acceleration Programme

Service as pre-defined by NearUS:

The aim of the NearUS 'Bussiness Acceleration Programme' services is to support 18 EU entrepreneurs over a course of 3 years wishing to commercialise their technologies/products/solutions in the US. They will be supported for up to four months during their initial installation phase. These activities will cover:

- Business development and sales/marketing plan
- Introduction to the local community, strategic partners, events and law firms (concerning incorporation and IP protection), business angel networks, venture capital firms.
- Introduction to end-clients for Proofs of Concept and Pilots
- Product management requirements documents (Market Requirements Document, Product Requirements Document)
- Organisations' collaterals (including website)
- Advisory Sessions with industry experts

Conclusions from the demand analysis (B2B):

Based on the survey results of the demand analysis, there is a high interest in such a support programme, mostly from private organisations, and in particular SMEs, many with only 1-5 or 6-15 employees. Most organisations are involved in ICT, however there is also a high number of respondents involved in Human health related fields, Energy Production, Services and Manufacturing and Industry.

There is a relatively high demand for most sub-services, on the contrary the demand for support for marketing collaterals is very low. Sub-services with particularly high demand are support for business development and sales/marketing plan, support for introduction to local community (strategic partners, events and law firms, business angel networks, venture capital firms), and support for introduction to end-clients for Proofs of Concept and Pilots.

Conclusions from the offer analysis:

On the supply side, 29 entities with a “comparable” offer were identified through the online survey and further 42 organisations were identified through a desktop research mapping. Most of the service providers charge a fee or get equity for the service they provide. The types of organisations providing this service are largely Accelerators, but there are also some other private, governmental organisations as well as university/city incubators providing the service.

Regarding sector-focus, the most common thematic fields identified through the offer mapping were ICT (31/42), but there are also many Accelerators focusing on businesses involved in Creative Technologies and Media (21/42), Healthcare / Medical Devices / Pharma (11/42), and Energy / Environment / Cleantech (9/42). It is visible that many of the mapped accelerators focus on tech-oriented start-ups, e.g. Disney Accelerator, K5, Capital Innovators, Portugal Ventures, Techstars and Betaspring.

60% (25/42) of the organisations identified through the offer mapping that provide Acceleration in the US are located in the state of California. 4 more are located in Massachusetts, 3 in Texas, 2 in Pennsylvania, 2 in New York and 6 more spread across other states.

Through the mapping it has become clear that there are 22 organisations that provide the service to anyone, 4 to European stakeholders, and the rest to either US nationals or to the respective nationals of EU governmental or private organisations, such as Innovation Center Denmark and Nordic Innovation House located in the Silicon Valley; swissnex located in Boston and San Francisco; German Accelerator located in San Francisco, Silicon Valley, New York and Boston; Innovation Norway, Spain Tech Center and Portugal Ventures in San Francisco, French Accelerator in Los Angeles and Enterprise Ireland in New York.

Identified Gap and recommendations for operational roadmap:

Based on the demand analysis, there is a very high demand for this service amongst business-type stakeholders. Most of the potential customers are predominantly interested in support related to business development and sales/marketing for introduction to the local community, as well as introduction to end-clients for Proofs of Concept and Pilots, so the developers of the NearUS service should ensure that a high level of expertise in these areas is provided.

On the supply side, there are many existing US accelerators that are open to anyone (as long as the participants have the legal right to reside in the US for the duration of the programme, and in some cases if the start-up is based in the US). On the European side, it is worth noting that some of the accelerators located in the US are subsidiaries of EU governmental organisations or private organisations: these often support only the respective nationals. The Scandinavian countries, Germany, Switzerland, Portugal, France, Ireland and Spain already have representations in the US that provide acceleration services, all of which are located either in the states of California, Massachusetts or New York.

Out of all the acceleration programmes, most are located in California and are tech-oriented. This gives room for the NearUS Business Acceleration Programme to cover a wider range of customers not only in San Francisco but also in other regions of the US. Customers from Eastern European countries and small Western European countries that do not have a representation in the US seems to be a segment to focus on. Service could also be developed in addition to San Francisco, on the East Coast, possibly Boston or New York area where there are fewer service providers, and be open to participants from a large spectrum of backgrounds (rather than limited to ICT and tech), including those involved in Human health related fields, Energy Production, Services and Manufacturing and Industry.

Bootcamps

Service as pre-defined by NearUS:

Three two-week bootcamps will be held throughout the first years of the pilot programme of NearUS, that will place selected EU R&I actors in the early stages of commercialising EU research at Soft Landing incubators affiliated within US R&I centres. Both R2M and B2B entities will have access to an aggressive networking and training programme that either explores or cements business possibilities for the entrepreneurs in the US.

These bootcamps will each provide 20, 40, 80 (years 1, 2, 3) EU participants with an opportunity to evaluate the commercial viability of their innovations and a meaningful perspective on the US business environment. The bootcamp will be conducted in an “incubator” format that includes a blend of educational workshops, opportunities to meet early-stage investors, as well as potential customers, and other market validation exercises. Educational workshops will be linked to existing entrepreneur-specific workshops such as InBIA’s NewCo Academy courses. In preparation for the bootcamps, a two-day kick-off workshop will be held in Europe to prepare for various elements of the programme commencing in the US. The overall schedule of the first bootcamps include the following:

- 2 days of orientation in the NearUS Boston Centre, including the course “Conducting Business in the US” and one-on-one consultations with legal service providers
- At least 6 days of programming specific to the entrepreneur’s market sector at InBIA Soft Landing sites throughout the US with focused resources (courses, mentors, customer and supplier networking opportunities, etc.) within their industry sector
- A daily webcourse offering from the InBIA NewCo Academy to refine the entrepreneur’s investment and customer pitch decks and collateral
- Concluding 2 days back in Boston for a large investor and strategic customer networking event enabling the entrepreneur to demonstrate their product/services

Conclusions from the demand analysis (B2B/R2M):

Based on the survey results, there was a high demand for this service amongst the B2B strand: most of them rated the service very highly as an interest, and expressed a willingness to take part in it whenever it is available (immediate need). On the other hand, most of the respondents who chose “bootcamps” in the R2M strand seemed to be researchers in the pre-start-up phase, who did not signal a high level of interest (many rated the service at 3 out of 5) and most of who said they would be like to take part in it in 2-5 years’ time, when they would be more prepared to utilize the service. The service was originally targeted towards stakeholders in the early phase of commercialization, and the survey results support the same conclusion, therefore it is suggested to target start-ups and SMEs, but also to merge the service for the B2B and R2M strand wherever possible. In the B2B strand there was a relatively high percentage of organisations involved in ICT (66%) and Human health (39%). Also, for most respondents, it did not matter whether the bootcamp would take place on the East Coast or the West Coast, as long as they would be able to find potential partners/profit from the service. The desired duration of the bootcamp is clearer: most respondents (45%) preferred a 1-week long bootcamp, while 16% had a preference for 2 weeks, and it is important to note that no respondent chose 3 weeks. It is also worth noting that 51% of the potential customers do not have any activity in the US yet, thus it means they would be willing to fly to the US for a 1-or 2-week camp.

Conclusions from the offer analysis:

The offer analysis for bootcamps was partly based on the survey results - 21 providers were identified, out of which 12 provide it for fee-for-service, 6 free-of-charge, and 3 in another way. The organisations that provide such bootcamps identified themselves most frequently as SMEs, Clusters, Start-ups, Technology Transfer Offices, Business Association / Business Networks. As for where the service providers come from, it is very diverse, there were 3 service providers from Germany, and less than three from countries such as Spain, Portugal, Hungary, Latvia, Finland, Czech Republic, Denmark, United Kingdom, Austria, France. The collaboration of US R&I entities and European R&I actors to develop or participate in entrepreneurship education programmes is not necessarily new. Some existing programmes which already have collaborative content between the two continents include: European Innovation Academy[6] (delivered outside of US but built from US R&I entities; 15 days in duration); Startup bootcamp[7] (delivered globally including in the US; sector or tech specific; 3 months in duration). All these initiatives will be considered when finalising the value proposition of this service.

Identified Gap and recommendations for operational roadmap:

Based on the demand analysis there is a high potential for this service: start-ups and SMEs seem to be highly interested in it and ready to become customers. There was a preference for a 1-week, rather than 2-week bootcamp amongst respondents, however the "individualised" format of the service supposes longer sessions. The description of the bootcamp in the promotional materials shall therefore highlight the "individual" part of the bootcamp and the format of this service should be further defined when being tested through the pilot.

On the supply side, an educational bootcamp does not seem to be a too common service currently on the market of services provided to EU entrepreneurs, therefore there seems to be a "service gap".

The first Bootcamp is to be anticipated on the East Coast March 4 – 16, 2018 (with Pre-Departure workshops in Europe at the end of January). For the pilot actions, it is advised to try to merge the events for R2M and B2B strands or consider reorienting the applicants towards the strands that are the most indicated to them if necessary.

This NearUS offer will stand out due to its highly individualised programme – only 2 days at the beginning and 2 days at the end will be organized as a "group training/programme", while the rest (1 week) will be organised according to the clients' specific needs and within their

[6] http://inacademy.eu/about-eia/

[7] https://www.startupbootcamp.org/how-it-works/

technology and/or industry sector. This will presumably make the NearUS bootcamp programme stand out amongst other offers and offer a highly personalised service that does not seem to yet exist for European stakeholders. However, the relatively high travel expenses required from the participants might be a blocking point for the potential applicants and thus might have an impact on the number of applications. This should be considered in the pilot actions call.

Innovation Tours

Service as pre-defined by NearUS:

During these US innovation tours, EU R&I actors that are in the process of commercializing innovative EU research through new business ventures will be introduced to incubators, accelerators and US university innovation centres located across up to 3 US cities or states. The tour will include soft landing hubs and ecosystems that can provide EU participants with guidance on the US business climate, visa/immigration/tax/contract/IPR support and introductions to potential customers and partners. Three tours will be organised, each consisting of 10, 20, 40 (years 1, 2, 3) individual EU R&I actors who are highly interested in exploring the US market for their research. The innovation tours will be held in concert with key US tradeshows or trade/FDI conferences such as SelectUSA or State EDO events.

Conclusions from the demand analysis (B2B/R2M):

This was the second most popular service in both R2M and B2B strands. 60% were highly interested in the service, however most respondents indicated preferring attending an exploration tour “only once”. The majority of respondents have a preference for the programme to become available in the next 2 to 5 years, thus showing that most respondents are not ready for going international but willing and / or planning to do so and prefer to have time for further investigation and preparation, in line with the previous deduction for the R2M strand. Most of the highly interested respondents of the R2M strand were research organisations / universities, however there was also some demand from medium sized SMEs.

In the B2B strand, most respondents marked themselves as SMEs, and showed a higher interest towards the service based on one subcriteria: more respondents were ready to attend as soon as possible or this year and attend several times, and 71% of the respondents were highly interested in the service (rated the service at 4 or 5 on a scale of 5). There were 65% organisations active in the field of ICT, 42% in Human health and 39% in Energy production and distribution. For most respondents, the location of the service did not matter as long as they could find potential partners. The most interested respondents who rated the service highly and requested it either as soon as possible or this year, mainly come from Bulgaria (5) and Hungary (4).

Conclusions from the offer analysis:

In total, 35 entities were identified from the online survey and 22 from the desktop research mapping, thus 57 in total. This service is offered mostly on a fee-for-service basis.

In the mapping, the service providers identified were mostly private organisations, but there were also some non-profits and governmental organisations. 9 of the mapped service providers that offer this service in the US are located in California, 2 in New York, D.C. and Pennsylvania respectively, and the remaining 7 are spread across other states.

Out of the mapped service providers, 8 offer it to anyone interested regardless of nationality, while 6 offer it to European nationals only. There are also the ones who offer it to a specific target group: 1 to Spanish SMEs, 1 respectively to citizens of Ireland, the UK and France, Denmark and Norway, and 1 to all Nordic countries. For example, in Germany, the German Innovators offers the gateways for German companies to Silicon Valley and organizes tailor made tours, especially in the ICT sector. Innovation Centre Denmark offers the Scaleit Ignite service that offers to start-ups the opportunity to go to the Silicon Valley and learn how it works.

Identified Gap and recommendations for operational roadmap:

The demand for this service amongst business type of stakeholders is high. Research organisations / universities also appeared interested in this service, on a longer time span. On the supply side, it seems like there are relatively few offers on the market that correspond to NearUS' Innovation Tours. Thus, there is a potential "service gap".

Similarly to the previous services, the gap related to geography for this service is the lack of service providers mostly in the Eastern European region. Furthermore, there do not seem to be that many "R&I Exploration Tours" service offers in general on the market compared to some other existing services.

This service was originally designed for the R2M strand. However, in the survey, it appeared Business stakeholders' also shown a high interest in this service. Therefore, it is suggested to consider providing the service for a wider audience of business-/ market-oriented specialists with research and business backgrounds (e.g. CTO and business developers).

The added value of this NearUS service is that it will be tailor-made specifically to European clients, thus possessing and providing all the necessary knowledge on entry of EU entities/individuals to the US market (e.g. guidance on visa/immigration support). The service could be offered to the European regional authorities who can take in charge (part of the) costs of their local companies, eg. through Structural Funds or other sources – this is especially important for Eastern European countries.

The first NearUS Innovation Tour with 10 participants is planned to be on the West Coast in the Silicon Valley and its surroundings from the 15th until the 19th of January 2018 and on the East Coast from 8th until the 13th of June 2018 in Boston/ New York/New Jersey.

Matchmaking and Pitching events (B2B/R2M)

Service as pre-defined by NearUS:

This service matches EU entrepreneurs looking for partnering and investment opportunities in the US at Matchmaking Events (or Connecting events depending on size of groups and prep time) and also during pitch competitions to investors such as at CES or BIO MatchFest/PitchFest. If desired by clients a joint EU pavilion at these events can be put in place.

Conclusions from the demand analysis (B2B/R2M):

The majority of the respondents in the R2M strand were research organisations that did not particularly express a high interest towards this service, therefore their responses will be rather considered for the "Matchmaking events for researchers", towards which they expressed a higher interest notably due to their background and their misidentification with the R2M strand. On the contrary, in the B2B strand this was the most popular service: two thirds of the respondents who chose B2B as their strand of interest also displayed an interest in Matchmaking events. Most of the respondents ranked the service as 4 or 5 on a scale of 5 and the most popular answer regarding the timing of the service was that they would like to attend this year. 14% were interested to attend matchmaking events primarily if there is a special occasion, such as a major international trade show or forum. Out of those who marked 5 as level of interest, most respondents were Hungarian and German. Also, nearly half (and most) of the respondents who ticked either 4 or 5 as level of interest were private organisations. As for the other services, the majority of the respondents (64%) is involved in ICT, and around 40% respectively is involved in Energy production, Human health related service and Manufacturing and industry.

Conclusions from the offer analysis:

In the offer analysis 33 entities with a comparable Connecting offer were identified through the online survey and further 54 organisations were identified through desktop research mapping for both the R2M and B2B strand. However; it is interesting to see that out of 54, 40 provide the service only to “B2B”, 12 provide it to both, B2B and R2M strand, while only 2 entities provide it exclusively to R2M, reinforcing the previous conclusions. Only a very few formal matchmaking events with platforms in the USA could be identified.

Most of the service providers identified through the survey charge for the service, but there are some that provide it for free (likely benefiting from indirect funding). From the mapping, the types of service providers are Governmental (18), Private organisations (14), Non-profit organisations (10), Accelerators (4), Trade Associations (2), Research Center / Institutes (2), EDOs (2), Consulting Firms (1). Most (31) of these services are industry agnostic, while a few focus on ICT, Creative Technologies and Media and Healthcare / Medical Devices / Pharma.

24 mapped organisations are located in California, 6 in Massachusetts, 5 in New York state, 4 in Washington D.C. and the 14 other ones are spread across the rest of the states. From the organisations that provide this Connecting service, 14 offer it to anyone interested, regardless of nationality, 7 offer it to Europeans, while some offer it to their respective nationals e.g. 7 to Germany, 6 to the UK, 5 to Ireland, 4 to Finland, 2 to Switzerland and France respectively.

For example, the Research and Innovation Network Austria (RINA) provides supporting services related with informing, assisting and connecting Austrian researchers and innovators in developing business opportunities in the US. BAIA from Italy organises matchmaking events to connect Italian and US businesses. Since its inception, BAIA has already organised over 130 events in Italy and in the US which have been attended by more than 15,000 entrepreneurs. The R2M networking sessions are mainly exploratory and often only serve to identify potential partners and clients.

In contrast, the objective of B2B networking sessions is to discuss possible EU-US business collaborations considering the strategic interests of both EU and US parties. The GTAI from Germany, for example, acts as the first point of contact for Germany’s export-oriented small and medium-sized enterprise sector. In addition, the EEN, largest network of business and innovation support organisations for the benefit of EU SMEs, develops the “Going International” service, which is provided to SMEs across Europe, identifying relevant business partners in target countries, namely the US. This is developed through matchmaking events and with the support of the local American partners (notably EAEC).

Identified Gap and recommendations for operational roadmap:

There is a very high demand for Matchmaking and Pitching events and other connecting events, but also a high supply of Connecting services in the US on the market, therefore there is no evident "service gap" as such. Further explorations of the US markets, on geographic and sectorial criteria, as well as online matchmaking platforms should be conducted for refining NearUS service offers. 14 service providers are open to "anyone", and countries such as Germany, the UK and Ireland have a lot of service providers, however many European countries are underrepresented, and while they could potentially be using US-originated service providers, there is room to develop Matchmaking services that target Europeans specifically.

Finally, regarding the potential domains of interest, beyond ICT, which remains first, 40% of the survey respondents were involved in Energy production, Human health related service respectively and Manufacturing and industry, so could be worth developing services for stakeholders who are active in these sectors and in states that are known for such industries, e.g. Texas.

The first pilot event is planned to take place in Las Vegas on 7-11 January 2018 back-to-back to the Consumer Electronics Show. In addition, one Connecting and Venture Capital Pitching East Coast event will be combined at the conclusion of the Boot Camps each year.

Business-/Market-related Media Promotion Service

Service as pre-defined by NearUS:

European researchers, technology start-ups, but also SMEs, willing to expand to the US need media support as one of the major support services. This service helps them (1) to get visibility in the US and thus helps a lot to get more meetings with potential customers; (2) to have more credibility when meeting customers; (3) to get partnering with US companies. This service aims particularly at providing Europeans with the following media promotion:

- Writing of press releases and attractive articles about the companies, their products etc.;
- Publications in major tech medias like Techcrunch and others;
- Help for the companies' staff to write blog posts, as one of their marketing tools.

All clients will be supported in finding partners for media promotion. This is an "add-on service": 10 participants/year (30 in total) for the activities Working Visits, 3 States in 5 Days Tour, Boot Camps, Business Acceleration Programme are selected to get sponsoring for media promotion (if need is stated in their call application).

Conclusions from the demand analysis (B2B):

The R2M analysis is in line with the previous conclusions, therefore only the B2B strand will be considered for this analysis. This service ranked as the "least demanded" one in all three strands, however it seems like B2B stakeholders were still slightly more interested in it compared to the stakeholders of the two other strands: 28% of all the respondents who clicked on B2B were also interested in Media Promotion service, while this rate was only 21% for R2M and 17% for R2R. The majority of the respondents rated the service at 4 or 5 and demanded it this year and on a continuous basis. These "statistics" were higher as well in the B2B compared to the 2 other strands. Amongst the B2B respondents there was a high number of Incubators/ Entrepreneurship centres, Start-ups, Scale-ups and SMEs. Most were active in ICT, Energy and Manufacturing related fields, however many respondents were also involved in "Services" or chose "Other" as their thematic field of activity. It was also clear that the service needs to be developed in the EU or both the EU and the US. For “US only” the demand is very low, with only 2 out of 30 respondents

Conclusions from the offer analysis:

Based on the survey results, the least provided service to the B2B strand is “Media Promotion Service”, offered only by 13 entities. The service is mostly provided for a fee. However, through the mapping, 30 entities were identified that offer Media Promotion Services for Business type of stakeholders. 10 of these service providers are located in California, 5 in New York, 4 in Massachusetts, 2 in Illinois and the rest is spread across the US. 7 providers offer it to all Europeans, 10 exclusively to Germans, 5 to UK, 2 to Swiss, 2 to French, 1 to Czech, 1 to Irish and 1 to Portuguese. Plus, 3 offer it to anyone regardless of nationality.

Identified Gap and recommendations for operational roadmap:

Based on the results of the survey, the demand for this service was moderate, however there still seems to be more interest from start-ups and entrepreneurs compared to researchers in the R2M strand. Regarding the supply, there seems to be a relatively high number of service providers that target European stakeholders, and some that target their own nationals: Germany stood out in this respect having 10 entities that provide Media promotion services.

Overall, it is advised to follow the operational roadmap and incorporate this service as a “package deal” to clients that participate in face-to-face services such as Business Acceleration programme and Bootcamps, rather than offering it on its own. Based on the demand analysis, it could also be advised to develop it in Europe, should a “gap” become more evident over time. Regarding the location in Europe, it could be sensible to have it in some “less represented” countries, possibly such as Hungary or Poland.

Work space for businesses (R2M/B2B)

Service as pre-defined by NearUS:

NearUS provides work space, infrastructure and secondment opportunities to private and public European organisations coming to the US and seeking a landing hub (Centre or Associated centre of the Network) directly in the right eco-system suitable to their needs. All centres used as landing hub have been gone through thorough quality assessment and are InBIA accredited.

Conclusions from the demand analysis (B2B):

The R2M analysis is in line with the previous conclusions, therefore only the B2B strand will be considered for this analysis. There was a moderate interest for “Work space” in the B2B strand based on the survey results. Most of the respondents were SMEs and intermediaries, such as Incubators/ Entrepreneurship centres. As usual, most respondents were active in the field of ICT and Human health services/ Industry/ Energy production, however in relative terms there was an unusually high number of organisations involved in Public administration, security and defence. Most respondents who expressed interest in this service are highly interested in it (4 or 5) and would require it this year or in the next 2 to 5 years. For most respondents, it does not matter whether the service will be proposed on the East or the West Coast, and 42% of them do not have any activities in the US yet. Some of the responses of those who had a preference for the West Coast specified interest in Los Angeles, Silicon Valley, San Francisco, Palo Alto, while those for the East Coast put down New York, Boston and Southern Florida. Furthermore, providing a physical office space was pointed out by several interviewees as a very valuable potential service. In particular, this physical office space could provide support to European start-ups to access the American market, and providing a platform for accessing relevant partners and new research areas.

Conclusions from the offer analysis:

21 organisations provide work space to the B2B strand based on the survey and 55 organisations provide co-working space to businesses based on the mapping. The service is mostly offered on a fee-for-service basis. A lot of mapped providers are Accelerators and Incubators, however there are also other type of Non-profit, Governmental, as well as private organisations that provide the service. More than half of these entities support stakeholders involved in ICT, but there are also many that are not sector specific.

Overall 14 entities of EU origin and 41 entities of US origin were identified through the mapping exercise, which of course are all located in the US, more specifically 60% of them are located in California, while the rest can be found spread all over the US. For example, Bay Shore Technology Park provides Office Space in California. PARISOMA, based in San Francisco, provides foreign (majority French) entrepreneurs “light” side services and tools to grow their business, like freelancers or “ad hoc” entrepreneurs in residence.

Co-working space is mainly (42 providers) provided to anyone, regardless of nationality. 4 provide it to Europeans and 1 to Nordics. Plus, 3 to Germany, 2 to Switzerland, One to Denmark, 1 to Norway, 1 to Spain and 1 to Italy.

Identified Gap and recommendations for operational roadmap:

Even though the demand for work space amongst the survey respondents was not high, there seems to be a potential for this service. A lot of the respondents are active in ICT, Human health and Public administration, security and defence, however this does not provide the authors with information on the type of work space needed. Indeed, there is no possibility to assess if the work space wanted are labs or ‘common open spaces’. From the authors’ point of view, further investigations on the type(s) of work space are thus needed, and, if the demand is confirmed, agreements between the Centre and the local entities providing lab space, would be welcome. Since there were unusually many organisations working in the sector of “Public administration, security and defence”, it should be considered for the design of the service to exchange with public administrations in different EU countries on their needs of work/office and representation space.

On the supply side, there are many existing offers, so there is no evident “service gap” as such. However, there is a “geographical” gap, namely that a lot of the space providers are located in California. Differentiation through the type of service provided (aside workspace *per se*) in the facilities would thus be an important aspect to further explore, such as transatlantic expertise, relevant custom support and custom coaching. Testing these formats in the 2 locations where the NearUS centres are supposed to be initially running, San Francisco Bay Area and Boston, could be a key indicator of success. In the long-term the service is expected to be needed in other areas of the US, therefore the plan is to provide such work space opportunity to EU stakeholders across the US at the NearUS Landing Hubs.

Innovation/ Market studies

Service as pre-defined by NearUS:

The “4 Innovation/Market specific studies that support the EU R&I communities' interest in the US” will identify key players based on a set of criteria (e.g. market share, trends), determine hot spots of related influencing sectors through US cluster mapping data tools such as the US Cluster Mapping Project sponsored by the US Department of Commerce (www.clustermapping.us) or VC's investing in a particular sector and determine related technology developers/vendors. These studies will complement the face-to-face services, providing additional relevant information to the participating Europeans; while making the highly relevant information available to the wider EU R&I communities through the training and advice.

Conclusions from the demand analysis (B2B):

Since in the R2M strand, the service was named as ‘Guidelines and information on the US research landscape, list of key-contacts, etc. facilitating collaborations with US counterparts', this will be considered for the Research-oriented service names as “Thematic Research Studies”.

The service named as ‘Guidelines and information on the US innovation & business landscape, list of key-contacts, etc. facilitating collaborations with US counterparts' was the 5th most demanded B2B service. There is a moderately high (61/109) interest in this service. 2/3s of the respondents marked 4 or 5 as their level of interest in the service and many are willing to use the service either as soon as possible or this year. The 17 most highly demanding respondents were from various sectors and organisation types. Some of them SMEs and start-ups from countries like Hungary and Austria, while others included Business Associations, Small and Medium Enterprises Promotion Agencies, and Clusters. Most, around 60% of respondents are active in the field of ICT, and around 35% are involved in Human health related service, Energy production, Manufacturing and industry and Service, respectively, however it needs to be added that this was a multiple choice question in the survey. Thus, it would be advised to develop the studies as much as possible related to these thematic fields.

Business/Market-related Digital tools

Service as pre-defined by NearUS:

“First – Aid Information Kits” comprise of a set of handy, easy-to-follow guidelines with essential information on entering the US market. They will be in a downloadable booklet format. The kits will include a section on available critical support services provided by the Network/Centres and other relevant entities in the EU and the US, with a list of key contacts.

“Online education modules” on sector specific topics related to market entry issues, or steps to establishing collaborations taking into account the US culture and policies.

“Step-by-step navigation” (on Network/Centres´ webpage) of available resources to assess US regional markets, identify potential partners (market or research), etc.

“Webinars”: Eight webinars (one hour long) highlighting the critical aspects of our studies or challenges put forward by potential clients. The webinars will start as non-sector specific in nature. If there is a high demand for webinars from researchers and companies within a specific field or sector, the webinars will be adjusted to meet the demand. Each webinar will be linked with the project Online Helpdesk to answer further questions regarding each topic.

Conclusions from the demand analysis (B2B):

Initially the service "Business/Market-related Step-by-step navigation" was separated from the step of the digital tools, however the results for both services were very similar, thus in this analysis they have been integrated. In total, there were 145 (from all the 3 strands, counting the respondents only once) potential customers interested in "Various digital tools". There was more interest amongst research type of stakeholders than businesses, which is also reflected in the ranking of the service: in B2B (9th with 41/109) it ranked much lower than R2R (6th with 99/203) or R2M (5th with 95/190). The demand indicator, thus the rating, and the desired timing and frequency for the service were not that high for the B2B strand either, respondents mostly marked it at 4, but the answers generally varied. The service "Business-/Market-related Step-by-step navigation" ranked a little bit lower in the B2B strand compared to the other two strands as well: whereas it ranked as 5th in the R2R and R2M strands, in the B2B it ranked as the 7th with 54 /109 respondents expressing interest in it. However, in spite of a lack of "clicks", respondents that did choose the service, ranked it highly. Overall, the interest and willingness to invest into these digital services was notably lower in the B2B strand compared to the other strands, thus it seems like business type of stakeholders have a preference to attend 'face-to-face' events rather than investing into digital tools.

Business/Market-related Training Events

Service as pre-defined by NearUS:

Training Events across Europe about 'How to internationalise with the US' will be organised for a broad audience. These events will provide information on understanding the US R&I landscape, steps for self-diagnosis and how NearUS can help with access to the US. The project team will develop physical promotional materials, for example: (1) Understanding the US research and innovation landscape (Background information); (2) Are you ready for the US? (Steps for self-diagnosis); (3) Is the US on your radar? (Market Opportunities), (4) Knowing your co-players (analysis of partners and competitors) (5) Why our Centre? Over the course of the project, 15 events will be organised: two by each of the EU partners in their respective country as well as in other regions, and 5 by RCISD across the Danube area. A focus will be set on MS/AC that do not have R&I representations in the US. NearUS will seek synergies and complementarities with other internationalisation programmes and events offered by national and regional organisations, such as Trade Promotion Agencies and Cluster Agencies.

Conclusions from the demand analysis (B2B):

This service ranked as the 6th in the B2B strand, thus there was a moderate interest in it. 61% of respondents marked either 4 or 5 as their level of interest. The answers are split between those who would like to attend training events several times a year (28%) and those who would like to attend only once (26%). Regarding the location, there is an obvious majority (44%) of those who would like the service to take place in the EU, while 25% are interested in both locations, however only 9% have a preference for the training events to take place in the US. A substantial proportion of the respondents (72%) would like to meet regional stakeholders in matchmaking events aside these events. Amongst the 15 most highly demanding respondents, there are numerous SMEs, start-ups and scale-ups but also many intermediaries, such as Clusters, Chambers of Commerce and Business Networks.

Conclusions from the offer analysis:

There were two services identified through mapping that corresponded to the services outlined above: Business-oriented Education/training and Business-oriented Information services.

Overall, 55 mapped service providers offered Business-oriented Education/training. They are all located in the US and, in line with the analysis made, a high concentration was observed in California. As for the type or organisation that provide such services, there were mostly Incubators and Accelerators. The services are mainly provided to anyone, regardless of nationality, while 4 provide it to Europeans. In addition, 6 to entities from UK, 3 from Germany, 2 from Switzerland, 1 from Sweden, 1 from Spain and 1 from Denmark provide it to their respective nationals.

51 entities provide business-oriented Information services based on desktop research. The types of organisations that provide these services are mostly Governmental (17) and Non-profits (15), however 11 Private organisations were identified as well. There were 9 US providers and 42 EU providers identified, though only 3 of the EU providers are not fiscally present in the US. Again, through the offer analysis scope, most of the ones identified (20) are located in California. The providers offer the service to anyone (10), Europeans (6), organizations from the UK (12), from Germany (7), from Ireland (6), and so on. As for the sectors, most of them are not sector-specific, whereas most of the sector-specific providers focus on clients involved in ICT, Creative Technologies and Media.

Identified Gap and recommendations for operational roadmap:

Overall, amongst the 3 information / education / training-centred NearUS services above, business-oriented stakeholders, such as SMEs and Start-ups, seem to have the highest interest in Innovation/Market studies, followed by Training events, and seem to be least interested in using digital tools. However, in general the demand towards these services seems to be moderate, rather than high amongst there type of stakeholders. It seems that stakeholders in the process of commercialisation prefer to attend face-to-face services which could result in networking/investment opportunities, rather than “learning” via online tools or trainings. Nevertheless, these latter ones shouldn’t be overlooked, since the educative value of such contents could prove to be necessary to the un- or wrongly informed stakeholders.

There seems to be a more-or-less corresponding offer on the market, however, the NearUS training events and online information will be specifically targeted at EU R&I stakeholders, thus will incorporate all the necessary background knowledge on legal issues regarding EU citizens willing to expand to the US, and as such may be offering a preferable offer compared to the already existing ones on the market.

3.2 Additional considerations

3.2.1 Conclusions on sector focus

Demand analysis – respondents' sector focus

The demand analysis identified that regarding the thematic area of the 318 respondents, 50% of the organisations are involved in ICT, 40% in Human health and social work activities, 31% in Energy production and distribution, and so on. Interestingly, respondents are working on thematic areas that are in line with EU priorities concerning the EU-US R&I strategy[8]. Within ICT, most respondents are involved in computer programming / consultancy or information service activities, while within Human health services most respondents are involved in activities related to medical services.

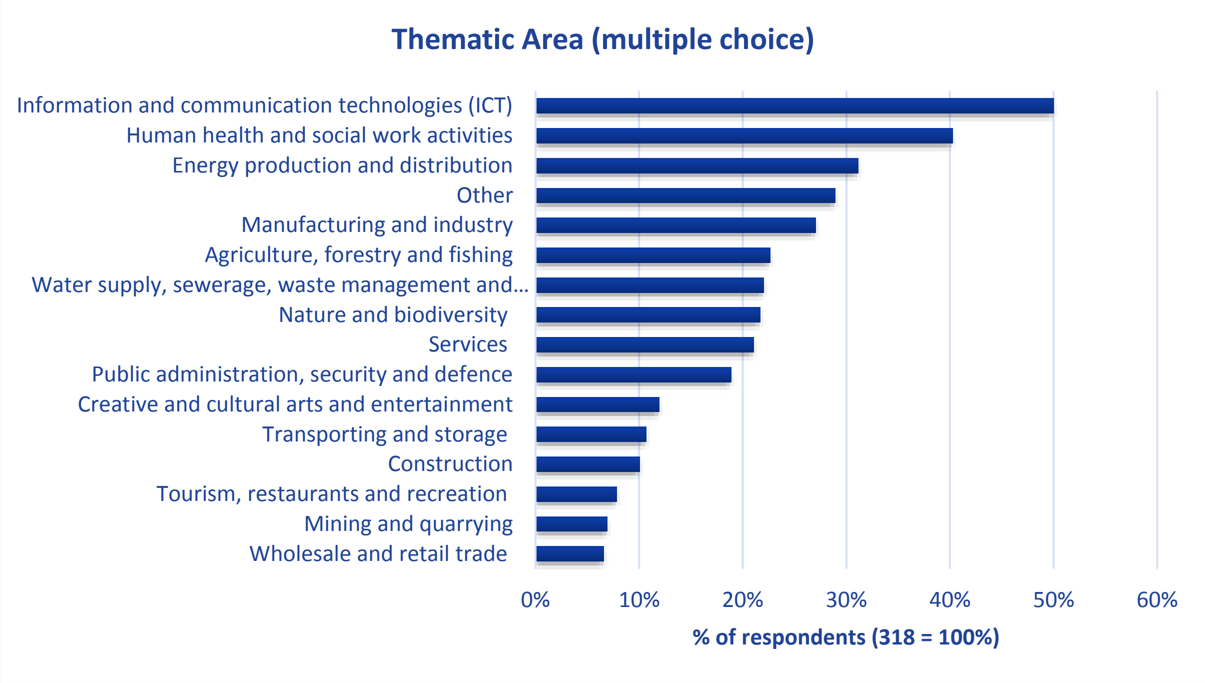

Figure 2: Thematic areas of the 318 respondents interested in the US

Offer analysis

Based on the desktop research within the offer analysis, it seems like clients involved in the following sectors were often targeted by service providers, unless the service providers were "open" to anyone (99): ICT (70); Creative Technologies and Media (41); Healthcare / Medical Devices / Pharma (33); Energy / Environment / Cleantech (27), Finance (18) Manufacturing

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[8] European Commission. Roadmap for EU - USA S&T cooperation. 2016. Retrieved from http://ec.europa.eu/research/iscp/pdf/policy/roadmaps_usa-2016.pdf#view=fit&pagemode=none

(16); Aerospace (14); Infrastructure / Construction / Transportation / Water (11); Agro & food (13); Automotive (8).

Overall, there is an abundance of offers for clients involved in ICT, however it seems like some of the most highly demanding potential customers, according to the demand analysis, are those involved in Human health and social work activities, Energy production and distribution and Manufacturing and industry. There were also a lot of respondents who are involved in fields related to Agriculture/ Water/ Nature, as well as Services. As, such NearUS should ensure that the services are open to a wide array of topics, including niche topics, and do not only focus on ICT/ tech-oriented stakeholders.

3.2.2 Geographical considerations

3.2.2.1 Geographical considerations in the US

Offer analysis- Service providers' location in the US

Through the mapping, in total 284 service providers could be identified, 157 from the EU and 127 from the US. *Figure 3: Location of identified Service Providers in the US*, shows where the service providers are located in the US. The darker the shade of red is for a given state, the larger is the concentration of service providers (in the states marked with grey no service providers were identified within the offer analysis due to the lack of R&I and demand from stakeholders for these states). Out of the 284 service providers, 232 service providers were identified having locations in the US. Amongst them are notably EU and US organisations.

The US states of California, Washington DC and NY show the highest concentration of service providers. It is visible that almost half of the organisations providing support are located in California: 100 service providing organisations could be identified in the analysis made. In Washington D.C. most service providers are the EU MS embassies located there. Although Boston is an important city for STI, not many service providers could be identified in the state of Massachusetts.

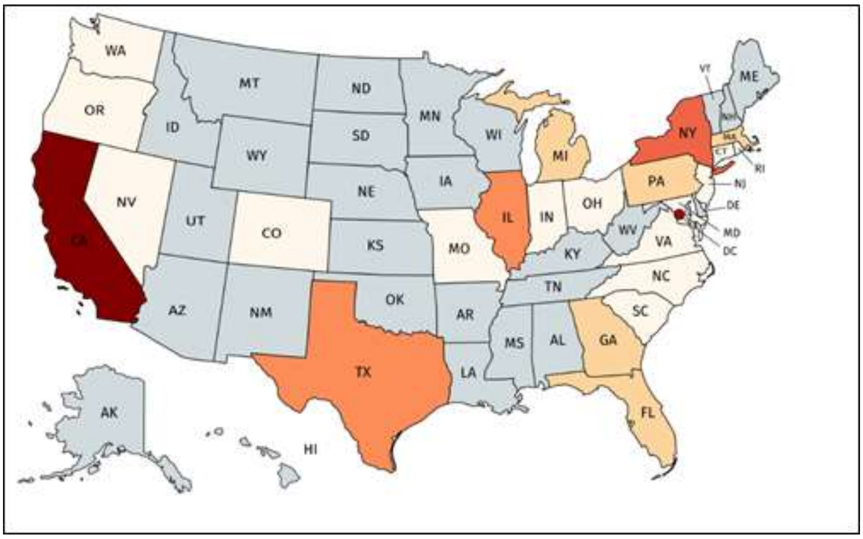

Figure 3: Location of identified Service Providers in the US

Demand analysis- respondents' preference of location in the US

In the scope of the demand analysis, respondents were asked for certain services (mainly in the business-/market- oriented strand) whether they would prefer them to take place in the EU or in the US – and in other cases to share their preference between attending services on the East or the West Coast in the US. Some of the results are displayed below in *Figure 4: Respondents' preference for location per service*.

It can be concluded that for the services that are not US-specific, such as matchmaking or training events on how to internationalise, respondents prefer to attend events in the EU, or both, the EU and the US, but in any case not the US alone. This is most likely due to time and budget constraints.

For the "US-specific" services, such as Innovation Tours, Boot Camps and Work Space, in most cases respondents signalled that they do not care as long as they can find potential partners or investors. Some of the most frequently written location on the West Coast were Los Angeles, Silicon Valley, San Francisco, Palo Alto, Seattle while for the East Coast New York, Boston, Washington DC and Southern Florida.

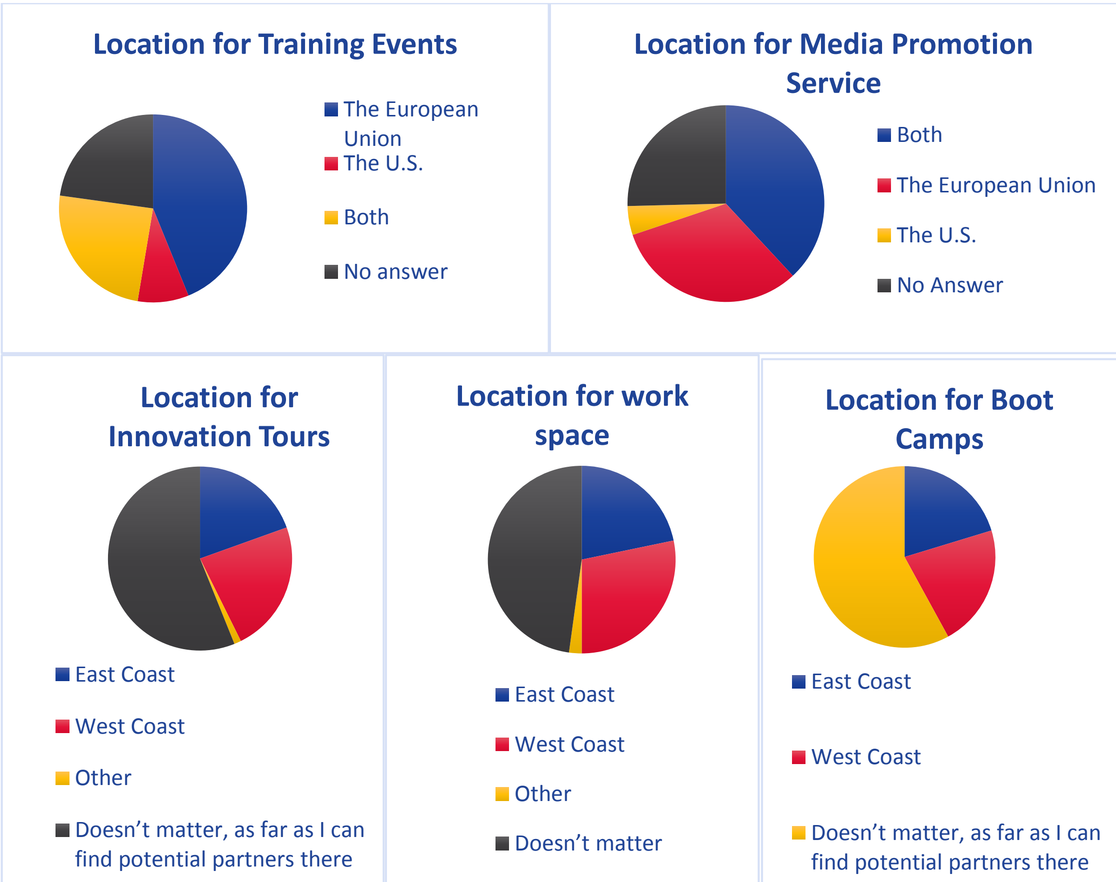

Figure 4: Respondents' preference for location per service

Synthesis of demand and supply- gap in US locations

East Coast and West Coast are the regions which are known / reputed in the STI landscape, therefore focus on these regions were made, when mapping existing service providers and when questioning potential NearUS clients, regarding their preference for location in the US.

The Network will initially have 1 Centre/Landing Hub in San Francisco and 1 Centre/Landing Hub in Boston. While a presence in California and the Silicon Valley area is crucial due to the fact that it is a key strategic area for R&I, the unique added value of NearUS services have to be particularly ensured here. It would also be sensible to establish presence in some of the more underrepresented West Coast areas/cities with a relatively high demand, therefore a "gap", such as Seattle, which is the home city of Amazon and Microsoft, and which is currently a hotbed for innovation. Regarding the East Coast, it is advised to sustain the focus on Boston – towards where more and more European health/life sciences firms orient themselves. It represents the top life sciences hub in the US, but also offers venture capital funding and support through strong clusters[9]. Nanotech firms also tend to go to hubs in Boston/MA. Other locations could include New York for the media and fintech sector, Texas for the energy sector, or Southern Florida for science/tech - some of the additional NearUS hubs that are planned to open by summer 2018 will probably be located in these areas.

3.2.2.2 Geographical considerations on EU MS/AC target customers

Offer analysis – geographical conclusions on target customers

Through the offer mapping 157 service providers from the EU MS/AC could be identified. Their distribution per country can be seen in Figure 5: Origin of EU Service Providers.

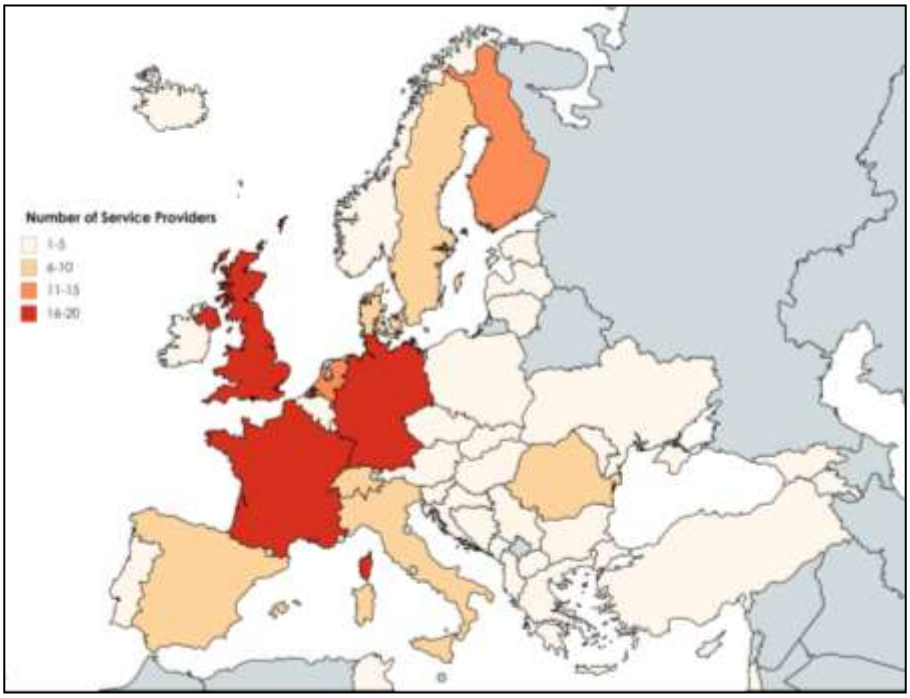

Figure 5: Origin of EU Service Providers

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[9] http://medcitynews.com/2011/11/new-report-the-nations-top-10-life-sciences-clusters/

When looking at the map it becomes clear that Germany, France and the UK have all at least 15 service providers respectively. The Netherlands and the Scandinavian countries, especially Finland, are also well presented.

However, once one looks at smaller economies, especially the ones in Eastern Europe, there are usually only one or two representations – in most cases the embassy and/or one Chamber of Commerce. The one exception to this case is Romania, which is represented by 6 Chambers of Commerce in the US, spread throughout the country[10].

EU MS/AC representation offices in the US

An important point of reference for European institutions when seeking support in EU-US STI relations are the government supported EU MS/AC representation offices in the US.

Some EU MS/AC have already existing governmental R&I trade presence/offices/representations in the US – the ones considered in the offer analysis being Germany, France, Spain, Holland, Belgium, Switzerland, and most of the Nordic countries. These representation offices are often first gate openers for the national organisations that want to internationalise to the US.

Figure 6: Countries with Representation Offices in the US

Demand analysis- geographical conclusions on target customers

Out of the 587 respondents taken into account for the demand analysis, 318 marked US as their country of interest for R&I activities. The distribution based on country of origin of these stakeholders can be seen in Figure 7. Most, that is 52 responses, came from Germany, 47 from Austria, followed by 19 from Slovenia, and so on.

[10] www.racc.ro/chapters.html

This reflects the high dissemination of the online survey in these countries, but also shows interest in the Network and its services in the US. However, the proportion of answers per country in comparison to dissemination efforts per country would need to be taken into account for a more thorough conclusion on this matter (rendered complex for data confidentiality reasons, as detailed in the demand analysis).

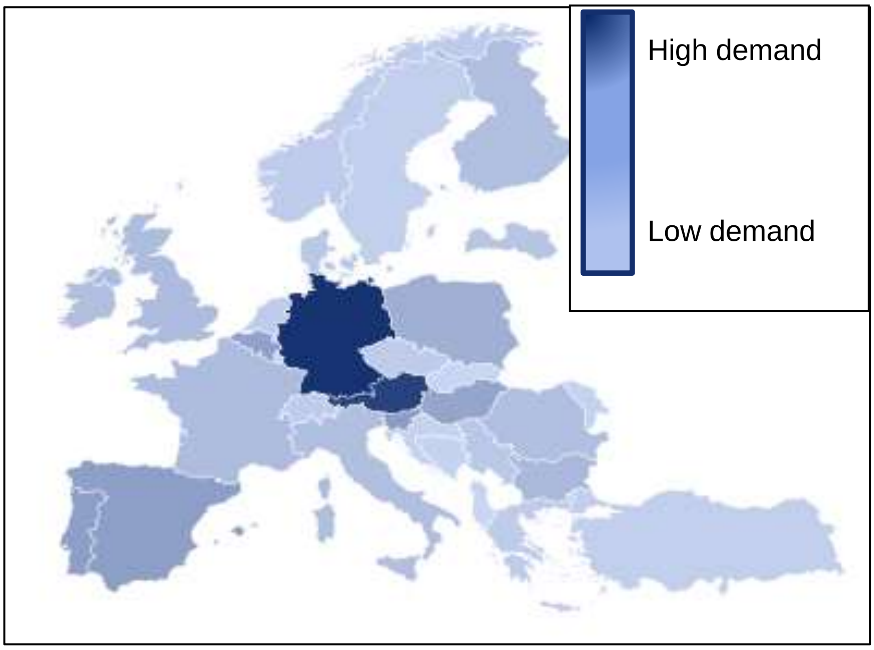

Figure 7: 318 stakeholders' absolute demand

In absolute terms, the distribution of the countries of origin was nearly equivalent to those of the 587 respondents. However, in order to get a deeper insight and see how the numbers correspond in relative terms, the figure below was created. The number of respondents interested in support for collaboration with the US from a given country were divided by the total number of extractable entries from the same country (including those interested in expanding their activities to China / Brazil / none of the 3 countries).

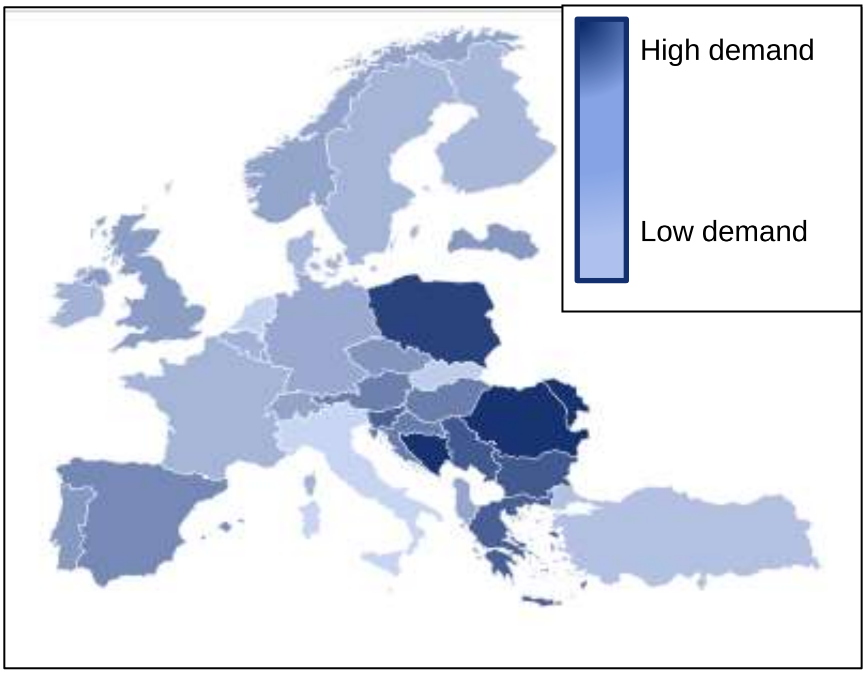

Figure 8: Stakeholders' relative demand

Given the samples size from certain countries, following assertions are indicative and provide trends that should be confirmed over time and NearUS developments.

The following segmentations have been observed regarding the potential target customers for NearUS support services through the demand analysis:

The majority of **Eastern European countries**, e.g. Bulgaria, Hungary, Poland, Romania, Slovenia seem to be highly interested in developing activities in the US. While in absolute terms, the number of survey respondents from these countries was not always very high, in relative terms, most of those who did respond to the survey from these countries, were also interested in the US: 81 out of 102 survey respondents in total from the countries above as well as other Eastern European countries with fewer responses, that is Moldova, Bosnia Herzegovina, Croatia, Czech Republic, Serbia, were interested in support for the US.

Germany and Austria, proved to be highly interested in international collaborations in general based on the high amount of survey responses from these countries, and in collaboration with the US in particular (US was the most popular destination for them amongst China, Brazil and the US). Out of 180 respondents in total from these 2 countries, 99 were seeking for support in the US. 60% of the 99 respondents were public organisations, many in the fields of ICT and Human Health Services.

Other Western and Northern European countries expressed relatively high interest: Portugal, Spain, Belgium, France, UK, Finland, Ireland and Denmark. In absolute terms, there is a high number of entries from these countries, signalling that they are highly interested in international collaborations, and are in need of support regarding collaboration with the US. Spain notably scored the highest in relative terms with more than 60% (18/29) of respondents looking for support in the US. Portugal and the UK are both above 50%. Belgium, Ireland, France, Finland and Denmark are around 40%.

Interestingly, there was quite a high survey response rate from Italy (28) and the Netherlands (13), however only 8 Italian and 4 Dutch organisations expressed need for support in the US. There was a low survey response rate from Sweden, Norway, Turkey, Latvia, Switzerland, Albania, Greece, Malta and Slovakia. The response rate from Cyprus, Estonia, Iceland, Israel and Lithuania is considered as negligible in this analysis due to low numbers.

Combining the results of the geographical conclusions of the demand and supply analysis - gap in the EU

1) Countries with Representation Offices

Based on the offer analysis, the countries with National Representation Offices or Agencies in the US are Norway, Sweden, Finland, Iceland, Denmark, Switzerland, Spain, Belgium, Germany and France. Interestingly, according to the European innovation scoreboard[11], these countries are generally "Innovation Leaders" or "Strong Innovators".

This is in correlation with the results of the demand analysis: out of the countries above only Germany demonstrated a high demand towards NearUS services. There was also a relatively high response rate from France and Finland, around 40% out of all the survey respondents from these countries were interested in the US.

The rest of the countries however, that is Norway, Sweden, Iceland and Switzerland barely answered to the survey at all, possibly signalling a relatively lower dissemination to these countries, but more probably a generally lower interest in international collaboration services because of the many already existing support structures.

2) Countries with a presence of independent service providers

Besides the governmental representational offices, the offer analysis identified overall 157 service providers in EU MS/AC countries with independent service providers. According to this desktop research, there are 16-20 service providers in France, Germany and the UK, 11-15 providers in Finland and the Netherlands, 6-10 providers Spain, Italy, Sweden, Switzerland, Denmark and Romania, and less than 5 providers in most other MS/AC countries.

Out of the countries with 16-20 providers, there seemed to be a very high demand from Germany, as previously mentioned, and a moderate demand from France and the UK, based on the demand analysis. As for the countries with 11-15 providers, that is Finland and the Netherlands, the demand analysis identified a low to moderate demand from these stakeholders.

Regarding the countries with 6-10 service providers, once again, there was a very low demand from Sweden and Switzerland and a moderate demand from Denmark. Interestingly, in the demand analysis Italy was the most outstanding case of a high survey response rate, but a very low interest in the US in particular: only 8 out of 28 respondents showed interest. Thus, based on the offer analysis, this may be due to a relatively low interest from the respondents having answered to the survey. On the other hand, the demand for NearUS services from Spain and Romania was high in the survey, in spite of each of these countries seemingly having more than 5 private service providers.

[11] http://ec.europa.eu/growth/industry/innovation/facts-figures/scoreboards_en

Considerations over the pricing policies set aside the pilot phase will validate the geographical area to be prioritised.

3) Countries with few service providers

The countries that, based on the offer analysis, have less than 5 independent service providers per country are Portugal, Belgium, Ireland, Austria, Poland, Czech Republic, Slovakia, Hungary, Croatia, Slovenia, Lithuania, Latvia, Estonia, Bosnia and Herzegovina, Serbia, Bulgaria, Moldova, Albania, Greece and Turkey. Thus, based on the offer analysis, these are the countries with a high need for support services.

This is indeed reinforced by the results of the demand analysis: as described in the previous section, it has been identified that countries from Eastern European region, especially Poland (13/14), Romania (8/8), Hungary (16/24), Slovenia (19/24) and Bulgaria (10/12) in relative terms showed a very high demand for NearUS services. Most of the respondents from the other Eastern European countries that did answer the survey were also highly interested in the US, e.g. 5/6 Serbian and 2/2 Bosnian respondents showed interest in the US, however most of the times the response rate is not high enough to draw definitive conclusions. There were no responses at all from Lithuania and Estonia, however this could also be due to uneven dissemination efforts.

All of the “underrepresented” Western European countries, that is Portugal (18/33), Belgium (17/39), Ireland (8/18) and Austria (47/71), had a high survey response rate, signalling that there is a need for support services for international collaboration in these countries. The interest towards the US in particular was moderately high, with Austria particularly standing out with overall 71 survey responses, and out of the 71 respondents, 47, that is more than 60% being interested in the NearUS services.

Overall, based on both, the offer and demand analysis, these are the countries where there is a lack of support services for collaboration with the US, and in the majority of these countries based on the survey, there is also a high demand for internationalisation to the US. Therefore, a “gap” can be identified.

The map below illustrates the joint results of the offer and demand analysis. Even though neither the offer nor the demand analysis can pretend presenting absolute and comprehensive figures, the conclusions can nevertheless illustrate clear trends: The bigger the gap between the demand and the supply, thus the higher the need there is for NearUS services, the darker the shade of the blue. The other extreme, a very light shade of blue depicts countries where there are many existing offers and a very low demand based on the NearUS survey. All countries have been rated on a scale of 10, 10 signalling the “biggest gap” and 1 signalling the “smallest gap”, based on the analysis above.

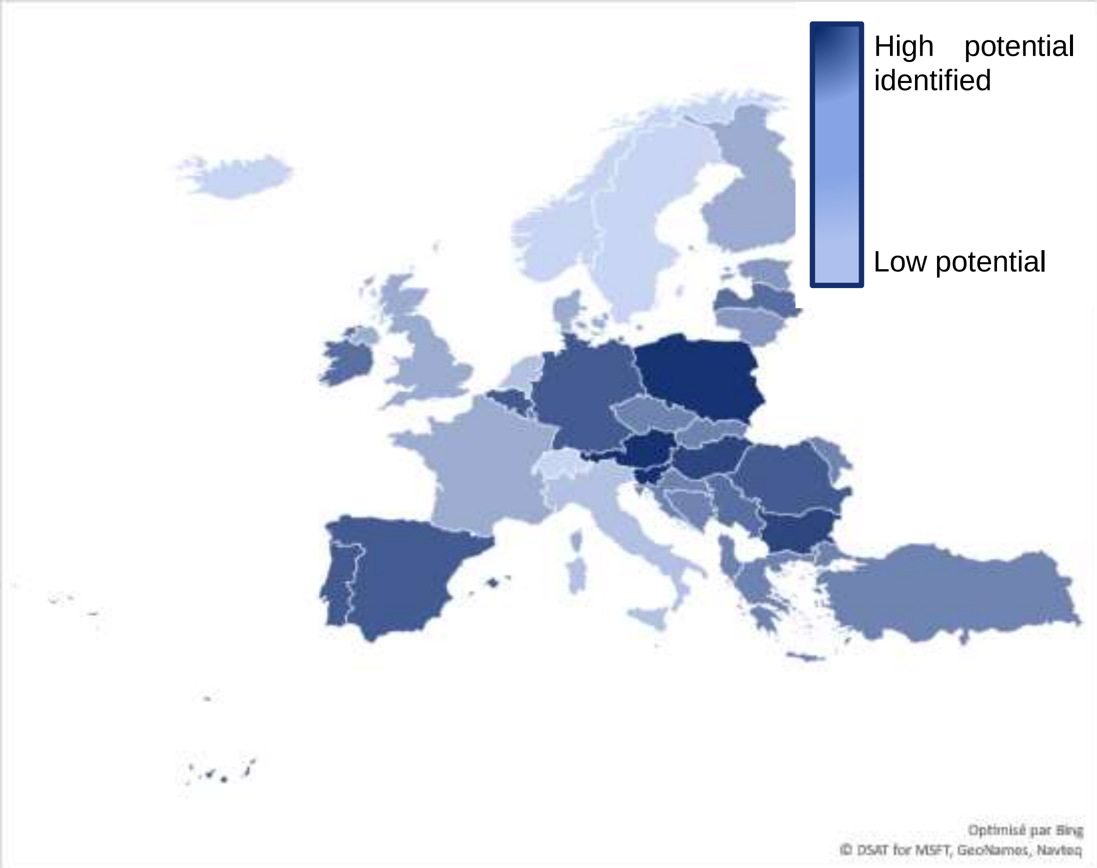

Figure 9: Mapping of NearUS potential target customers (geographic criteria)

To conclude, the countries with the biggest "service gap" identified, that is where the demand for support services in the US is high, and the supply is low, or where there is a very high demand for NearUS services in spite of existing support offers, are Austria, Poland and Slovenia. Other countries with a high need for NearUS services are Germany, Ireland, Portugal, Spain, Belgium, Hungary, Romania and Bulgaria. Furthermore, it can be assumed that most other Eastern European and Baltic countries with no support service offers identified, however also low survey response rate, could potentially be target customers, therefore such countries were rated at around 6/10.

These conclusions could serve as guidelines as to where to disseminate information about NearUS services, and in which countries it could possibly be worth to hold certain face-to-face services, such as training events. These conclusions should be further refined along the project developments.

3.2.3 Considerations over the NearUS value proposition

Having considered in which countries there is a lack of support services, and in which countries there is a high demand for such services is a good starting point. However, it also needs to be considered whether the stakeholders, regardless of their country of origin, would be "sustainable customers" from the perspective of the Network, that is: are they willing and able to pay, would they be frequent and/or long-term customers, would they come back over time asking for different types of services, are they ready to work hard and show good results. So, it needs to be considered whether the theory based on quantitative analysis would actually fit with the reality.

Cultural and regulatory differences

When considering the different regions of Europe, the channels throughout which NearUS will be able to reach out to the targeted stakeholders will need to be taken into consideration. Generally speaking, in Western European countries stakeholders such as SMEs and start-ups can be reached out to either directly or through intermediaries, such as clusters and business networks. Thus, it can be presumed that these stakeholders would either finance themselves, or possibly NearUS could charge the intermediaries, so that the individual stakeholders could get access to the NearUS services. In Eastern European countries, it could prove to be more difficult to reach out directly to researchers and start-ups, a more efficient strategy could be to reach out to such stakeholders through the governing bodies, especially since these stakeholders often rely on public funding to participate in programmes such as NearUS. Of course, drawing a line between Western and Eastern countries is an oversimplification of the issue, for a thorough examination, an analysis per country would have to be conducted.

Taking the cultural and regulatory differences within Europe one step further, it is also worth mentioning the differences between the EU and the US. One point to make is that the US is very successful in R&D due, notably, to the mindset that they need to invest resources and that they have to pay for certain key services[12]. In Europe, many organisations are driven by public support, thus want to get access to services for “free” [13]. This was well reflected in the NearUS survey answers, whereby about a half of the survey respondents indicated that they ‘do not know’ their investment capacities, they would not be able to pay for the services proposed or indicated unrealistically low levels of investment for the services proposed. Based on the interviews conducted in the scope of the demand analysis, in terms of the willingness to pay for the services suggested, the interviewees considered that it would be highly dependent on the value, and the added-value the clients would perceive for each service. The Return on Investment (ROI) was also stated by some of the interviewees as a relevant indicator to take into consideration when analysing the willingness to pay for such a service. In addition, some interviewees mentioned the possibility of having success fees on the services provided.

These results illustrate a sort of European "timorousness" on investment that is an integral part of the European culture of R&I. This is a barrier and should be a big driver in the NearUS endeavour. The NearUS project intends to play a role in changing mindsets towards more audacious innovative strategies. Therefore, in the long-term, it needs to be considered how to make NearUS sustainable, and how to target different countries based not only on the level of demand, but also based on the clients’ cultures and individual countries’ regulatory systems.

At the first stage, countries and/or individual stakeholders with a more Western/US mindset on R&I, might contribute more towards making the Network sustainable through paying fixed fees for services. Nevertheless, the issue of involving stakeholders with less means or less willingness to pay for NearUS services needs to be addressed – a possible solution could be having fees on commissions or success fees on the services provided. For example, if a

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[12] https://www.irishtimes.com/business/culture-drives-us-dominance-in-technology-innovation-1.2256262

[13] http://www2.itif.org/2015-comparing-american-european-innovation-cultures.pdf

service identified and supported the application of potential interesting opportunities (including funding schemes), depending on the size of the contract, the NearUS Network could receive a success fee (where applicable) in case the proposal is approved.

NearUS Value proposition- targeting a wide audience in a adapted way

The report has identified gaps regarding **types of services**: all services proposed by NearUS have more or less their equivalents on the market. Thus, there are no real obvious gaps in service provision. At the same time, it should be noted that very little can be said about the effectiveness / success rate and the quality of each of the services in this study. This element will become more obvious after evaluation of pilot services.

The report has also identified gaps regarding **geographic** criteria both in the analysis per service, as well as in *Figure 9: Mapping of NearUS potential target customers (geographic criteria)*: it is evident that certain European countries have much more existing support services than others. Based on this, the gap is to provide services for those countries that do not have such support mechanisms. Another gap is to provide services to Europeans “under one umbrella”, which includes providing all the administrative/legislative knowledge concerning entry to the US market/ collaboration with US researchers for “EU-citizens” as such; without competing with existing organisations /offers.

However, it would not be wise to disregard as targets the countries that already do have strong support services, and are active in the US. Thus, it is important to keep in mind that leveraging on what has been developed by such countries and adding value to their currently functioning offers, may also lead to good results. A good example for this could be Germany, where there are already a lot of existing offers as well as governmental representation offices, however there is still a high demand for further services, as confirmed by the survey, and possibly services that are different to the ones that already exist.

Therefore, it is worth thinking beyond the service and geographical gap, and consider what it is that those stakeholders who otherwise already do have offers on the table, and are eligible to choose from them, are lacking. Here is where NearUS’ value proposition on the market comes in. NearUS’ could distinguish itself in the following ways:

- **Unique selling proposition:** NearUS will provide high quality services from well-known and experienced organisations and professionals in the field of R&I. The clients will have the ability to have highly individualised services, adjusted to their specific needs e.g. the format of the boot camps, where each participant will have his/her own tailored programme. It will be open and give equal opportunity to applicants from all EU Member States, and will also have all the necessary background knowledge on both US and EU laws and regulations on entrance to the US by European businesses and researchers.
- **Wide range of services:** NearUS will provide a wide range of services. A customer will have the ability to become a “regular client” of the Network and therefore get “deals” for taking part in multiple services of interest. Also, possibly some services could be combined in the long-run (e.g. seminars, trade missions, matchmaking events), which would contribute to the effectiveness of different internationalisation support measures, especially for companies that start to internationalise. Thus, potentially a whole pathway of services could be provided to a client: beginning with networking services followed by information services up to acceleration for example.
- **Demand-driven market strategy:** In the offer analysis, it was found that most service providers provide their services to “whoever wants it”. NearUS will develop services

specifically targeted at certain types of stakeholders: (Research/ Business type). As such, in both strands all the services will be developed with all the necessary background knowledge of how to best address that type of stakeholder, what are the most common problems that can occur etc.

These holistic considerations, in line with the trends provided in this deliverable, need to be considered as first developments within the project process aiming at defining NearUS Centres / Network and services' value propositions. The actual steps foreseen within the project (and adapted according to this deliverable's outcomes) include Focus Groups on both sides of the Atlantic as well as pilot actions and their thorough evaluation. These activities will notably enable NearUS partners to test the services foreseen and confirm the interpretations made throughout all three 'offer', 'demand' and 'gap' analysis and ensure to **provide these services in complementarity to existing national and other initiatives.** As such, next developments will be pivotal for aligning the project outcomes with the demand identified and ensuring the partnering approach with the existing offer. As mentioned, focus groups and pilot actions evaluation will be pivotal for ensuring NearUS business models are embedded in a solid value proposition, refined over steps and time, as shown in Figure 10.

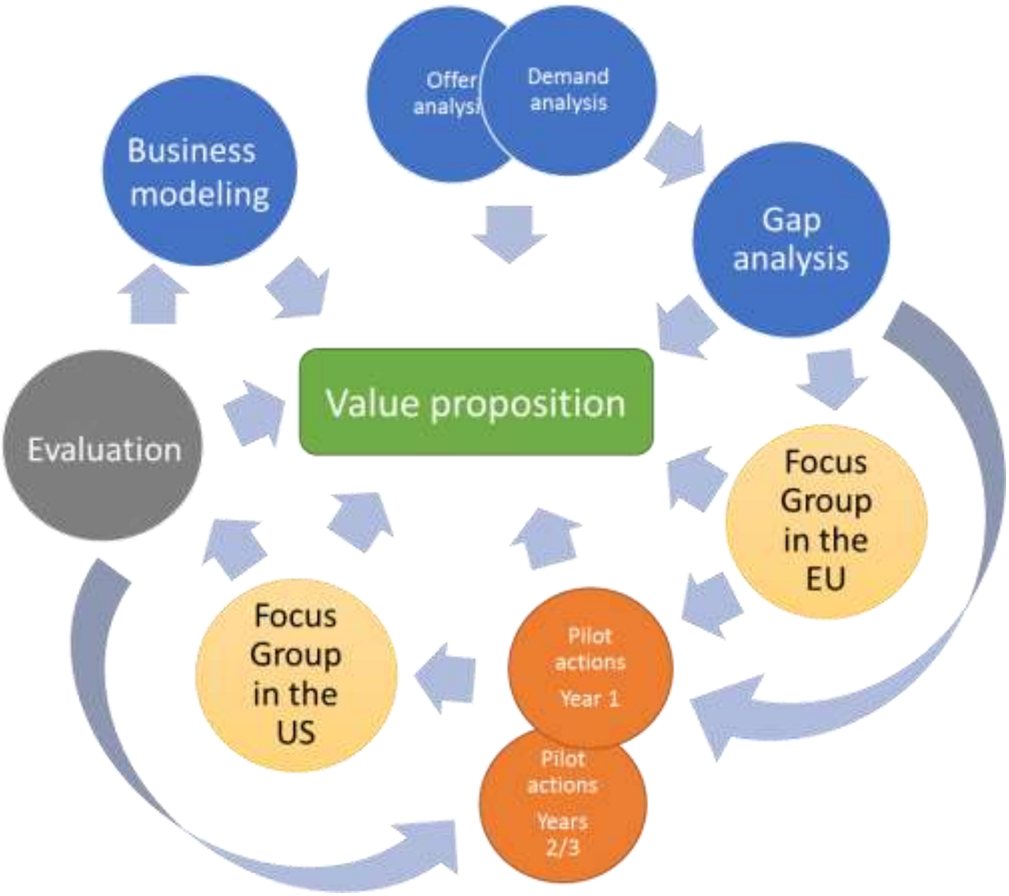

Figure 10: NearUS project method

3.2.4 Synergies with other initiatives/networks

So far it has become clear that there are numerous US-based service providers, out of which some are open to EU nationals, and there are also numerous national and/or private service providers in various EU countries that provide services to their respective nationals e.g. Innovation Center Denmark, swissnex and German Accelerator. Most of such service providers seem to focus primarily on their respective nationals. Certain European countries - many of which are located in Eastern Europe - seem then underrepresented and have limited access to services alike. The aim of NearUS, and its added value is to be open to the whole of Europe and as such provide services to “EU citizens” with the possession of all the necessary know-how and background knowledge of the EU laws and regulations. There are already a few existing EU initiatives that provide various services to EU organisations “under one umbrella”. The aim of NearUS is to create synergies with such initiatives as well as local stakeholders. The initiatives that could present potential synergies with the NearUS project are listed and described below. It is advised that each service responsible in NearUS analyses potential synergies and win-win collaboration opportunities on the service level with these initiatives/networks - and with others, when relevant. There is already regular on-going collaboration with some of these initiatives/networks on the NearUS level (e.g. EBN, InBIA). This goes without saying that NearUS will use these initiatives/networks as dissemination channels for all NearUS activities.

BILAT USA 4.0 project

The BILAT USA 4.0 project[14], funded by the European Union, has the overall aim to enhance, support and further develop the research and innovation cooperation between the European Union and the United States of America. A particular focus of the project is put on an intensification of interactions between EU and US researchers and innovators, the support for the improvement of research and innovation framework conditions, the provision of analyses delivering a sound base for decision making and an enhanced coordination and synergies between different EU MS/AC and US policies and programmes. While NearUS will provide various services for research and business type of stakeholders, considerable synergies could be developed, notably in relation to the research-oriented services.

Enterprise Europe Network (EEN)

The Enterprise Europe Network[15] helps businesses innovate and grow on an international scale. It is the world’s largest support network for small and medium-sized enterprises (SMEs) with international ambitions. The Network is active in more than 60 countries worldwide. It brings together 3,000 experts from more than 600-member organisations – all renowned for their excellence in business support and catalysing role in European initiatives. NearUS collaborates with EEN for the business-oriented services, especially with regard to dissemination and promotion activities, and creating synergies in the future e.g. joint events and services for business type of stakeholders.

[14] http://www.euussciencetechnology.eu/

[15] http://een.ec.europa.eu/about/about

European Cluster Collaboration Platform (ECCP)

The European Cluster Collaboration Platform[16] is a service facility aiming to provide cluster organisations with modern tools which allow to:

- make efficient use of networking instruments (search/find potential partners and opportunities);
- develop collaboration trans-nationally (within Europe) and internationally (beyond Europe);
- support the emergence of new value chains through cross-sectorial cooperation;
- access the latest quality information on cluster development;
- improve their performance and increase their – as well as their members' - competitiveness.

The ECCP offers both web-platform based facilities and activities like cluster matchmaking events, organised both in Europe and beyond.

Being at the service of cluster organisations, with a unique offer of facilities and tools to create a favourable environment for collaboration to emerge and develop, ECCP aims to become the leading European hub for international cluster cooperation, building cluster bridges between Europe and the world. Synergies between NearUS and ECCP to serve European clusters will be sought.

EURAXESS North America

EURAXESS North America[17] promotes researcher mobility and cooperation. Their aim is two-fold: firstly, they provide information about European fellowships, grants and calls for proposals for researchers of all nationalities, at all career stages, and scientific fields including social sciences and humanities; and secondly, they help European scientists based in Canada and the US to connect and network with the European Research Area through a platform called European Scientific Diasporas in North America. EURAXESS North America has an expertise in networking and information events, which brings the opportunity to build synergies in this field and possibly co-organise information events for researchers in the future. EURAXESS has also great knowledge on regulations for researcher mobility, e.g. visa regulations, and will be a fruitful partner for NearUS to serve European researchers with the best pilot services in line with the necessary regulations.

Startup Europe

Startup Europe[18] is an initiative of the European Commission, which falls under its priority of the 'Digital Single Market'. Its 4 main objectives are to:

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[16] https://www.clustercollaboration.eu/

[17] https://euraxess.ec.europa.eu/worldwide/north-america

[18] http://startupeuropeclub.eu/

- Connect people such as start-ups, investors, accelerators, female entrepreneurs, corporate networks, universities through their array of networks. The Startup Europe Map, a map which connects all start-up players in the European ecosystems, is part of this.
- Connect local start-up ecosystems by supporting regional initiatives such as Start-up Europe Week or Start-up Europe Regions Network.
- Help start-ups soft-land in other markets such as Silicon Valley (for example SEC2SV: Start-up Europe Comes to Silicon Valley initiative), India (for example the Start-up Europe India Summit), Africa (Start-up Europe Comes to Africa initiative, coming soon) and The United Arab Emirates (coming soon).
- Celebrate entrepreneurs' success (Techallstars, Europioneeers and StartUp Europe Awards).

As such, NearUS and Startup Europe should capitalise on each other's know-how regarding the needs and provision of support to start-ups, and create synergies especially in helping start-ups to soft-land in the US.

Eurochambres

Established in 1958 as a direct response to the creation of the European Economic Community, EUROCHAMBRES[19] acts as the eyes, ears and voice of the business community at EU level. EUROCHAMBRES represents over 20 million businesses in Europe through 45 members (43 national associations of chambers of commerce and industry and two transnational chamber organisations) and a European network of 1700 regional and local chambers. More than 93% of these businesses are small and medium sized enterprises (SMEs). Chambers' member businesses employ over 120 million. EUROCHAMBRES strives to improve the general conditions in which businesses operate, to facilitate access to markets within and beyond the EU and to ensure the availability of human, financial and natural resources. A collaboration between NearUS and Eurochambres could take place notably for dissemination matters towards business- / market- stakeholders.

European Business Angels Network

EBAN[20] is the pan-European representative for the early stage investor gathering over 150 member organizations more than 50 countries today. Established in 1999 by a group of pioneer angel networks in Europe with the collaboration of the European Commission and EURADA, EBAN represents a sector estimated to invest 7.5 billion Euros a year and playing a vital role in Europe's future, notably in the funding of SMEs. EBAN fuels Europe's growth through the creation of wealth and jobs. Thus, a collaboration between NearUS and EBAN focused on venture capital pitching and investment in businesses supported by NearUS, could be implemented on various aspects, from collaborating over services delivery to communication and dissemination activities.

ERRIN

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[19] http://www.eurochambres.eu/Content/default.asp?pagename=Home

[20] http://www.eban.org/about/who-we-are

Founded in 2001, ERRIN[21] is a unique Brussels-based platform of more than 120 regional stakeholders organisation most of whom are represented by their Brussels offices. ERRIN promotes knowledge exchange between its members, focusing on joint actions and project partnerships to strengthen regional research and innovation capacities. Through these actions ERRIN seeks to contribute to the implementation of the Europe 2020 Strategy, the Innovation Union flagship initiative and Smart Specialisation strategies. A cooperation between the two parties could further contribute to boosting R&I activities in the EU, possibly through the organisation of NearUS training events in the EU or in ecosystems information.

F6S

F6S[22] is home to 1.5 million tech founders, 600k start-ups and more than 12,000 start-up programs globally. F6S delivers founders more than $1 billion per year in opportunities, funding, grants and services. NearUS and F6S could mutually benefit from each other's network and create synergies in their services targeted towards start-ups. For example, NearUS calls are currently being promoted via F6S.

EIT's KICs – Knowledge and Innovation Communities

There are currently six Knowledge and Innovation Communities (KICs)[23] and each focuses on a different societal challenge:

- EIT Climate-KIC: addressing climate change mitigation and adaptation
- EIT Digital: addressing Information and Communication Technologies
- EIT InnoEnergy: addressing sustainable energy
- EIT Health: addressing healthy living and active ageing
- EIT Raw Materials: addressing sustainable exploration, extraction, processing, recycling and substitution
- EIT Food: putting Europe at the centre of a global revolution in food innovation and production

For example, **EIT Digital[24]** is a leading European digital innovation and entrepreneurial education organisation driving Europe's digital transformation. EIT Digital delivers breakthrough digital innovations to the market and breeds entrepreneurial talent for economic growth and improved quality of life in Europe. It does this by mobilising a pan-European ecosystem of over 130 top European corporations, SMEs, start-ups, universities and research institutes. It has a Silicon Valley Hub. There is a high potential for creating synergies with this initiative – in relation to the support of both, researchers as well as businesses, the format of such collaboration requiring further discussion with both parties in next developments.

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21 http://www.errin.eu/node/1623

22 https://www.f6s.com/

23 https://eit.europa.eu/tags/kics

24 https://www.eitdigital.eu/

4 Conclusions and recommendations

This document's main conclusions are summarised below.

Firstly, both the supply and the demand analysis confirmed that the definition "R2M" was not clear to the EU stakeholders. Therefore, it is suggested to have two rather than three strands, which shall be based on the objectives of the clients: Research-oriented services and Business/Market-oriented services. Inside these strands, target groups can be further defined, such as Research2Market, or Business2Business communities and this distribution will be tested in line with pilot actions developments.

Secondly, the gaps per service in both of the "new" strands were identified in chapter 3.1 Service related gaps. The aim of these developments is to provide added-value to the otherwise already existing support services on the market, thus overcoming the potential "gap" of high quality and client-oriented services targeted specifically at EU citizens. All the specific first recommendations for the roadmap per service are found in the 'orange' boxes after the analysis of each service. These indications will notably provide a first stepping stone for defining NearUS services value propositions, together with the Focus Groups and Evaluations of pilot actions.

Thirdly, the sectorial and geographical gaps were identified based on the conclusions of the demand and supply analysis, in Chapter 3.2. Regarding the sector-related gaps identified, it has become visible that many service providers focus on tech-oriented companies, thus NearUS could possibly ensure a provision of services to stakeholders involved in a wide range of fields, such as Health/Medicine and Energy production related fields, which were a common thematical field of the NearUS survey respondents.

Regarding the geographical gaps, it was seen that there is a large concentration of service providers in the state of California: while this area is of major importance in terms of R&I activities, NearUS should consider expanding in the long-term to other states, such as Florida, Texas and Washington, while also continuing its activities in Massachusetts on the East Coast. Finally, most of the service providers of European origin identified tend to work for providing US-related services only to their own nationals. Also, there seems to be a gap in most of the Eastern European countries, such as Slovenia, Poland, Hungary and Romania, where, according to the NearUS survey, there is a high interest in cooperation with the US, however a lack of representation. This also suggests that regional authorities, funding agencies and other relevant bodies (supporting local organisations, for example through Structural Funds) are the NearUS potential customers. Other highly interested European countries includes, for example, Austria, Germany, Ireland, Belgium, Portugal, Spain.

Considering the value proposition, it was established that cultural differences within Europe need to be taken into account: in order to target different regions different approaches might be necessary to make the Network sustainable. The added-value of NearUS is that it will provide a wide range of client-oriented services to applicants from all EU Member States, by local experts knowledgeable of the US market entrance parameters, specifically by EU businesses and researchers. NearUS assets could provide customers with the possibility to become a "regular client" of the Network and therefore get "deals" to potentially "subscribe" for a whole pathway of services: beginning with networking services followed by information services up to acceleration for example.

Finally, in 3.2.4 Synergies with other initiatives, it was discussed that NearUS will aim to establish synergies with already existing major initiatives and Networks, for ensuring its complementarity.

As a result, these considerations enable to draw lessons for NearUS next steps:

- While there is no obvious 'gap' for the set of services to be developed within the NearUS project, as foreseen by the project stakeholders, the added value could lie in its differentiated and adaptive approach towards potential EU customers for each of these services. This entails building upon the knowledge of partners on current activities for calibrating the services in view of users' actual needs;
- Semantic differences highlighted by the strands' reorganisation proposal throughout this document may entail an adaptation of the wording towards the targeted customers, rather than impacting the services' content;
- Sectorial and geographic considerations should be scrutinised by NearUS service providers under two perspectives: thematic and regions set forward in this document as potential areas to explore, and the current partners' (and associated partners') capacities. A lean approach could be applied by building upon the current set of areas and expertise within the partnership for first services and assess in parallel the ones that might be of interest for future developments;
- Focus group and pilot actions should be pivotal for further confirming (or disconfirming) the trends identified through this document. Beyond correcting this analysis' imperfections, these steps should further qualify the gaps identified and nourish NearUS' business models' definition;
- NearUS should further explore the potential collaborations with known stakeholders (such as EU initiatives, associated partners or local service providers) along the definition of its value proposition and keep an open approach towards additional stakeholders that could become potential partners. This would enable to alleviate certain potential 'pains' artificially created by a wrong assessment of NearUS as a "threat" by other service providers while NearUS intends to suggest partnerships and exploitation of synergies rather than competition.

These considerations should enable NearUS service 'leaders' drafting of adapted business models for each of the services foreseen, which will be tested in the project's next phases as displayed in following Figure 11.

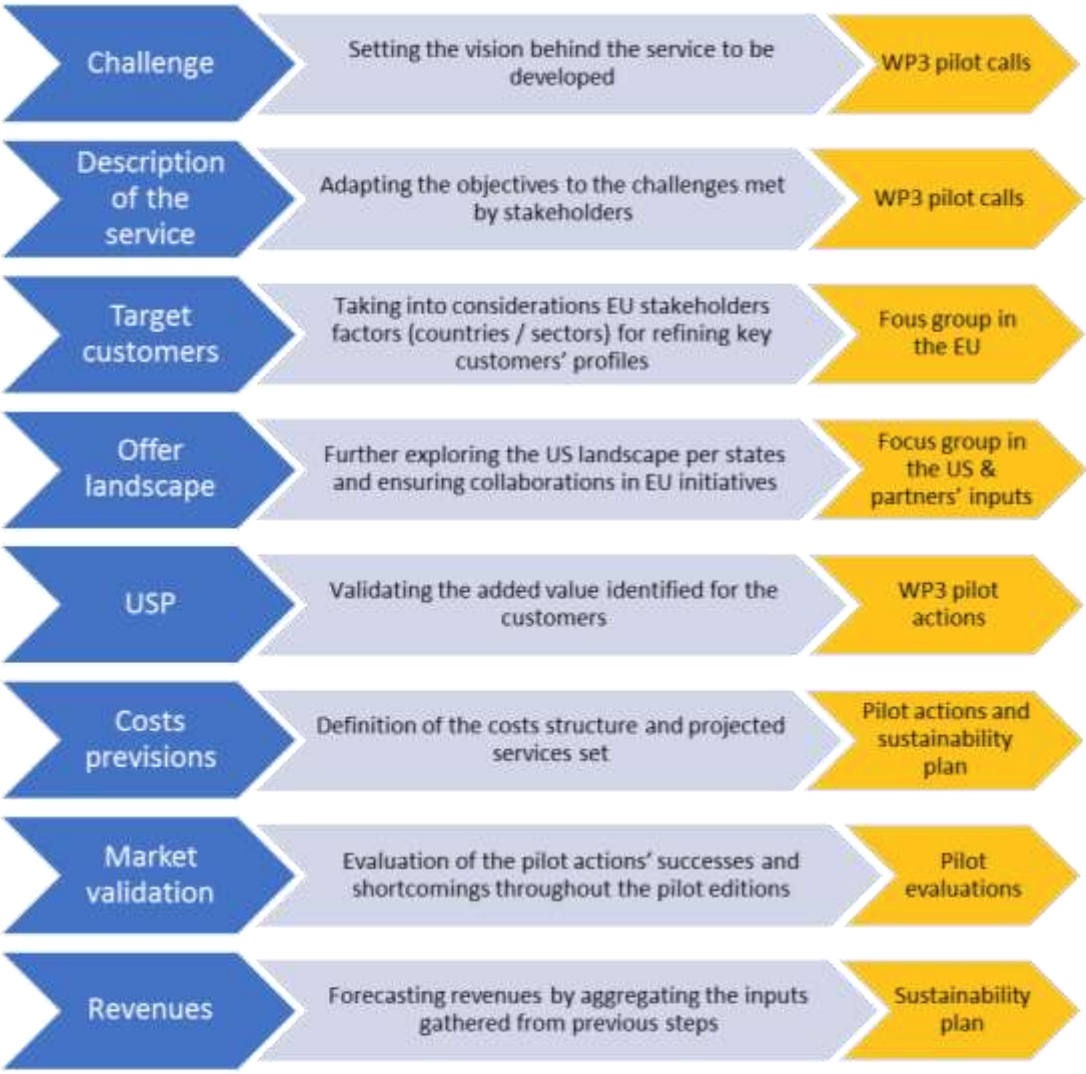

Figure 11: NearUS services' business modelling steps

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