



Inno Mob
Supporting Mobility Innovation



INNO-MOB

Unlocking the potential of Mobility Innovation Ecosystems and Networks

D2.2 Gaps Vignette report

(Version 0.1)

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3 Abbreviations

EC	European Commission
HE	Horizon Europe EU Research and Innovation Program
IDI	Individual In-depth Interview
IPR	Intellectual property rights
R&D+I	Research and Development and Innovation
SME	Small and Medium Sized Enterprise
WP	Work Package

4 Executive Summary: Gaps Vignette

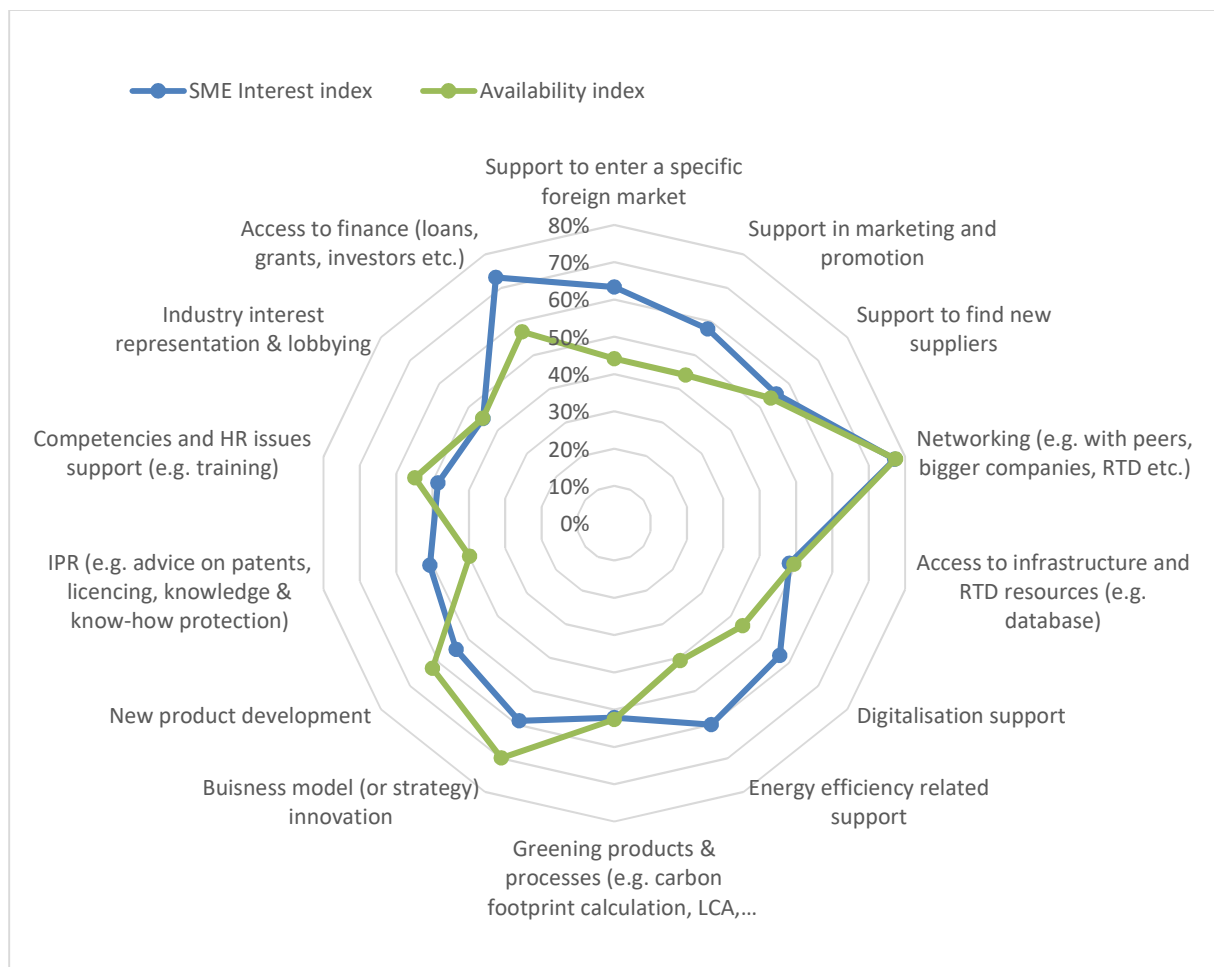
The hereby report presents the analysis of gaps in the services provided by the existing networks or initiatives based on: SMEs surveys and IDIs with service providers and stakeholders, as a second deliverable of the first step: *Receive mutual insights* of INNO-MOB *Unlocking the potential of Mobility Innovation Ecosystems and Networks* project, aiming at reduction of the innovation divide between strong and moderate innovators in European territories by increasing the inclusiveness of the existing networks and initiatives.

The objective of the report is to:

- To investigate the gaps in the services provided by the networks/initiatives,
- To identify the specific needs of key innovation stakeholders, including Tier 2 SMEs, as well as the participating countries and/or regions,
- To identify missing elements on the ecosystem support offer and features for customization of the provided services.

4.1 Gap 1 Mismatch between the service portfolio expected by SMEs and offered within ecosystem

Figure 1 Support services: interest & availability gap



The gap analysis reveals that the most important gaps of missing services are related to

- **Energy efficiency related support.** For this service category the interest index is higher of 19 percentage points than the availability index, also for this category the biggest difference is in the ranking sequence: it is no. 4 according to SMEs interest and no. 13 as for occurrence on the suppliers' offer;
- **Support to enter a specific foreign market,** for which the index difference is also 19 points, but comes second on the rankings' positions: it appears on the third position in the SMEs' interest ranking but on the tenth of availability ranking;
- **Support in marketing and promotion,** with 14 points of disparity as for the interest and availability indices and also discrepancy between high position on the SME interest ranking (third) but low on the popularity list among suppliers (tenth);
- **Digitalisation support,** with 13 points of difference in indices and considerable position difference on the ranking lists: 7th on the demand side and 12th on the supply side.
- **Access to finance** (loans, grants, investors etc.), for which the interest is 16 points higher than the availability, however the position on the ranking lists is high on both sides: demand (second) and supply (fourth).

IPR support (e.g. advice on patents, licencing, knowledge & know-how protection), for which 11% more SMEs are interested than organisations offering the support. However this category support is ranked low by SMEs (11th position) and requires high level of expertise by the support providers.

4.2 Gap 2 Misunderstandings between the perception of SMEs needs by the stakeholders and assessment of SMEs

Figure 2 SME needs perception gap



The comparison of the significance by the SMEs and the support stakeholders reveals that both sides consider ***new product development AND its introduction on the market*** as most important.

The biggest gap between the perception of SMEs needs by the stakeholders and assessment of SMEs is related to *price competition* and ***cost optimisation***, which is an important need expressed by the SMEs and underestimated by the support ecosystem.

4.3 Gap 3 Ability of the ecosystem to react to the changing needs of SMEs

The degree of flexibility of the ecosystem seems to be high as 37 stakeholders declare they are always adapting to the SMEs' needs and have no procedural constraints in doing so, whereas 12 stakeholders declare they have a continuous process of discussions with the partners and internally the observations of the market trends and SMEs feedback. 19 stakeholders declare they have some restrictions to the adaptation of the services, mostly related to the legal requirements or the rules of the projects, within which the services are provided. However none of them sees such restriction as a blocking factor to adapt to the changing needs.

More in depth analysis of the statements about the ability of the ecosystem to react to the changing needs of SMEs allows to consider it as rather **shallow and declarative**, without concrete statements about the adaptations to support them. In this point it is important to note that the ecosystems are not always equipped to quickly adapt to the changing needs of the SMEs. The adaptation is mostly with the individual approach to each client: [*We can adapt to every customer need*]. For some stakeholders, the flexibility consists in the themes of the events: workshops or training for the client. It does not include individual support for SMEs in reaction to the new need identified.

Only one stakeholder declared the development of a new service based on the client feedback: [*During the last year we have developed an additional service in response to the customers' needs and the market*]. 5 stakeholders have specific procedures for reflecting on the customer needs and introducing changes: [*we analyse the requests we receive at regular intervals and adapt our services according to the university's policy*]; [*We ask companies which trainings they want. We provide a list of 10 areas and then determine the top three topics based on the highest number of votes*].

4.4 Gap 4 Means to reach SMEs with communication about the service

The analysis of the IDI results concerning communication is not highly conclusive. Considering that the use of networks as a means to reach SMEs is rarely mentioned and little thought is given to communication, this aspect should be treated as an **area for improvement**.

4.5 Gap 5 Mismatch between the factors contributing to SMEs satisfaction/dissatisfaction in the service use experience and perceived quality factors constituting the value of the provided services

Figure 3 Quality factors perception gap



The biggest gap as for factors of high importance for SMEs underestimated by the supply side is related to **the time of delivery of support service**. Therefore the support service stakeholders should focus the improvement effort on this factor.

For both groups the most important factors of the services are related to the outcome of the service. The first on the importance ranking is the **usefulness of the outcome** and the second is the **quality of the outcomes**.

4.6 Insights for development of INNO-MOB collaboration model

The clients are most happy with services which are not always among most experienced. The specific services offered by innovation supporters, e.g. *New product development*, *Support to find new suppliers* and *Access to infrastructure and RTD resources* (e.g. *database*) were among least used but high-rated by companies which participated in

the survey. On the other hand commonly used services like *Access to finance*, *Digitalisation* and *Competencies and HR issues support* show relatively low rates of satisfaction. This means which are rarely used might bring high value to the company however companies need to be aware not only of their existence and availability but also of the fact that these services are able to meet their hidden needs.

Problem of companies being totally unaware of their needs (“they do not know, that they do not know”) does not exist in the case of all SME survey respondents. Either they are active in innovation (i.e. introduced some type of product innovation in the last 3 years) or they are aware of innovation barriers. It does not mean that the awareness does not need to be deepened. The practical conclusion is however that **there is always a starting point for the innovation support process, and it does not need to be started with the diagnostics process of need identification**, which can be annoying, especially for mature companies.

Companies are most prone to recognise the financial barriers to their innovation performance, especially as for the access to public funding. This was confirmed by the innovation supporters who are aware that this does not reflect the companies’ actual needs. Therefore it is necessary to establish long-term relationship with the companies to build their understanding that grants and loans are one form of companies support which should be complemented with services which increase companies’ capacities and allow spending money in a smarter way.

Companies operate in networks of partnership and the need for new partners occurs only at specific timing when an innovation endeavour is planned. It means that the support services might be important but the **business support needs to be able to provide the service to the right company at the right time**, which is a challenge for BSOs.

The **majority of companies** which took part in the INNO-MOB survey **have not used the services offered by the support networks yet.**

Reasons for companies being satisfied with the support services matches a lot with the perception of the clients’ positive feedback by support service providers. The both groups agree that the most important positive elements are: *professionalism of staff* (16 indications), through *flexibility in answering new trends* (13) and *good service quality* (11) to *time of delivery/keeping deadlines* (11).

5 Introduction

5.1 About INNO-MOB

The mobility sector requires new and creative solutions to reach its full potential. With this in mind, the EU-funded INNO-MOB project will develop an inclusive European ecosystem for supporting innovative businesses in the mobility sector. It will focus on exploiting opportunities in the sustainable mobility market and establishing interconnected innovation networks. The project will deliver a Mobility Innovation Network platform, along with joint awareness-raising and communication campaigns. The goal is to accelerate and bring innovative ideas to the market.

INNO-MOB will base its operating principles on four main blocks of activities: i) exploring the needs of the key innovation stakeholders ii) design, development and implementation of new schemes and collaborations iii) Connect & learn iv) sustain.

Figure 4 INNO-MOB work structure



The partnership of INNO-MOB brings together the skills and contributions of 7 partners from 7 countries representing strong innovators (CUS, ACCENT, BOOSTER), emerging/modest/moderate innovators (PPNT, RAPIV, ICMF, OKTHESS). INNO-MOB focus to interconnect innovation ecosystems in the mobility sector and support the enlargement of existing networks and initiatives, for that reason, a number of external stakeholders will participate in this process to benefit the networks they are representing.

No.	Partner	Short name	Country
Coordinator	Thessaloniki Innovation Ecosystem Non-Profit Organisation	OK!Thess	Greece
PP2	ACCENT INKUBATOR GMBH	ACCENT	Austria
PP3	BOOSTER LABS S.A.S	BOOSTER	France
PP4	INOVACIONI CENTAR MASINSKOG FAKULTETA DOO	ICMF	Serbia
PP5	FUNDACJA UNIWERSYTETU IM ADAMA MICKIEWICZA W POZNANIU	PPNT	Poland
PP6	REGIONALNA AGENCIJA ZA PREDPRIEMACHESTVO I INOVACII-VARNA	RAPIV	Bulgaria
PP7	Coventry University Services Ltd	CUS	UK

Table 1 INNO-MOB partnership overview

5.2 WP2 Expedite a holistic intelligence process

Innovation stakeholders are not always aware of the existing networks, the nature of their activities, ways to get involved, and support they offer. On the other hand, the networks fail to deliver the services which would bring value to these actors.

The Work Package 2 *Expedite a holistic intelligence* process is the first step in the above described process with the aim to receive insights from both: SMEs of the mobility sector and the support ecosystem stakeholders in order to define the gaps in the services provided by the existing networks or initiatives.

The WP started with the data collection by surveying SMEs and interviewing innovation actors who are actual and potential members of the networks of countries represented in INNO-MOB and beyond.

WP2 Leader (PPNT) prepared the methodology and research tools, consulted and tested them with partners. Two tools were prepared:

- A survey for SMEs in the mobility sector to get insights on their needs and experience with support services;
- An in-depth interview (IDI) guidelines to research stakeholders of the support ecosystem

The survey was implemented with the use of EUSurvey (<https://ec.europa.eu/eusurvey>). All partners were engaged in the acquisitions of respondents especially from the countries they represent.

All partners used the guideline and common answer form to interview the stakeholders in their countries.

As a result 367 survey answers were collected from SMEs and 93 IDI responses from ecosystem stakeholders in total.

Then the analysis of the data collected was performed with the aim:

- To identify the specific needs of key innovation stakeholders, including Tier 2 SMEs, as well as the participating countries and/or regions;
- To perform a gap analysis: missing elements and features for customization of the provided services by the INNO-MOB and engaged networks/ initiative.

Hereby report provides the results of the analysis and constitutes the final WP deliverable.

With the report WP2 provides insights on the specific needs of the innovation stakeholders and conclusions of comparative analysis between the needs (demand) and the offer in order to contribute to the development of a robust INNO-MOB collaboration model in WP3.

6 Gaps Vignette report (D2.2)

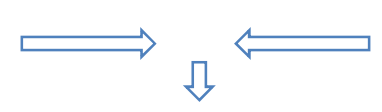
6.1 Purpose & scope

The hereby report presents conclusions of the comparative analysis of data collected through the survey among the mobility sector SMEs and the interviews with the support ecosystem stakeholders. The objective of the report is to:

- To investigate the gaps in the services provided by the networks/initiatives
- To identify the specific needs of key innovation stakeholders, including Tier 2 SMEs, as well as the participating countries and/or regions.
- To identify missing elements on the ecosystem support offer and features for customization of the provided services.

6.2 Methodology used

The methodology was based on mixed approach, combining quantitative and qualitative methods.

Information required: Exact and complete		Information require: Deep and contextual
Preferred quantitative methods	Mixed methods	Preferred qualitative methods

While quantitative research allows to define facts about the research object, e.g. current situation of the ecosystem (confirms or disproves theoretical propositions or insights from practice), qualitative analysis provides insights for interpretation of the factors related to the object, here: ecosystem. Qualitative research focuses on the perspectives of research participants, their subjective perceptions, experiences, and everyday contexts (Babbie E., 1992).

The WP2 Leader (PPNT) used a conceptual model of service quality as a point of departure. This model, based on a customer satisfaction-oriented approach by Parasuraman et al. (1988), was employed to identify the causes of dissatisfaction with network services among current and potential members. This analysis aimed to identify elements and features for the customization of network services. Parasuraman's models (both GAP and SERVQUAL) are one of the most known and widely used in the area of service quality. They are still the most cited models in this area (Mauri et al., 2013). More recent study on the usability of this model in several industries, including transportation, have demonstrated that it is still very valuable for service quality assessment (Yuan & Gao, 2019). The approach, originally developed for quality assessment of a single service provided by a specific supplier to specific customer has been adapted to analyse the quality aspects of many services delivered by many suppliers – ecosystem actors. Therefore the approach took the concept of gaps between the customer expectations, needs and experiences and the portfolio of services available, perception of the SMEs' needs by the ecosystem stakeholders. That means not all gaps in the original model were feasible for identification, whereas two crucial elements were necessary for addition: mismatch between the service portfolio and the

expectation of the SMEs as for the portfolio and two gaps were identified only as the degree of desirable ability on the side of service supply:

- Ability of the ecosystem to react to the changing needs of SMEs;
- Means to reach SMEs with communication about the service.

Gaps	ServQual		INNO-MOB
Gap 1	Misunderstanding the needs of the customer (The gap between Customer Expectation for the Quality of the service and Management Perception)	Gap 1	a) The mismatch between the service portfolio expected by SMEs and offered within ecosystem
		Gap 2	b) Misunderstandings between the perception of SMEs needs by the stakeholders and assessment of SMEs
Gap 2	Specification of the service – design of the service	Gap 3	Ability of the ecosystem to react to the changing needs of SMEs
Gap 3	The gap between Service Quality Specification and Service Delivery		<i>Not feasible for the ecosystem approach</i>
Gap 4	The gap between Service Delivery and External Communication	Gap 4	Means to reach SMEs with communication about the service
Gap 5	The gap between the Expected Service and Experienced Service.	Gap 5	Mismatch between the factors contributing to SMEs satisfaction/dissatisfaction in the service use experience and perceived quality factors constituting the value of the provided services

Table 2 Adaptation of ServQual quality gap model to INNO-MOB needs

For Gap 5, the decomposition about the quality aspects was altered to include the **Outcome** of the service that helps to effectively address the issue/need of the SME. The **Tangibles** dimension was reduced in the research tools to equipment and premises as they are less important in the service concept/design. But finally the respondents did not assess them in many cases, thus the dimension was abandoned entirely in the analysis phase. The **Assurance** dimension did not returned comparable results in both research collection exercises (SME survey & stakeholder IDIs) so in consequence was also abandoned in the analysis as well.

Quality dimension	Quality factor
Empathy	Convenient business hours
	Focus on the client issue
Outcome	Usefulness of the outcome
	Quality of the outcome
Reliability	Professionalism of staff
	Keeping promises
Responsiveness	Time of delivery
	Flexibility to the customer limitations

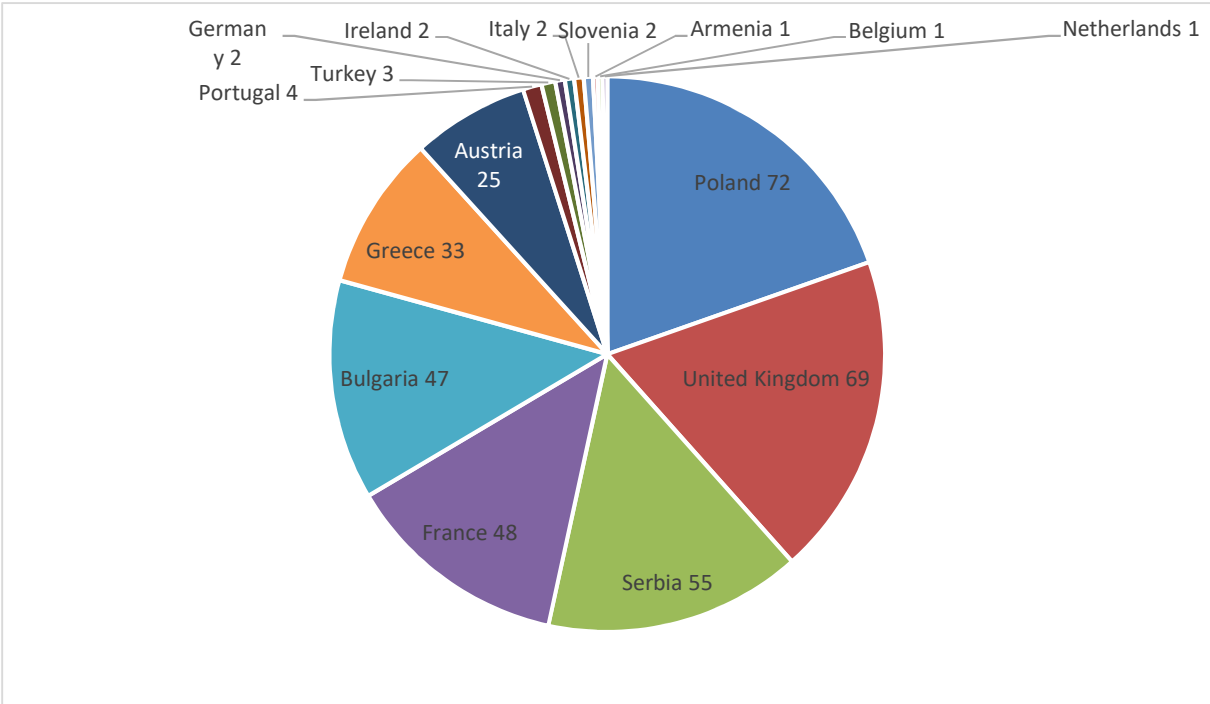
Table 3 Decomposition of support service quality dimensions in INNO-MOB

Within the SMEs survey respondents were asked as for the experience with a cafeteria of services, their satisfaction or dissatisfaction with each, they have used and assess the reasons within the quality dimensions as above. Whereas the support ecosystem stakeholders were asked to assess comparable dimensions as constituting the main value of their services.

7 Service Gaps and Needs data analysis: SME survey

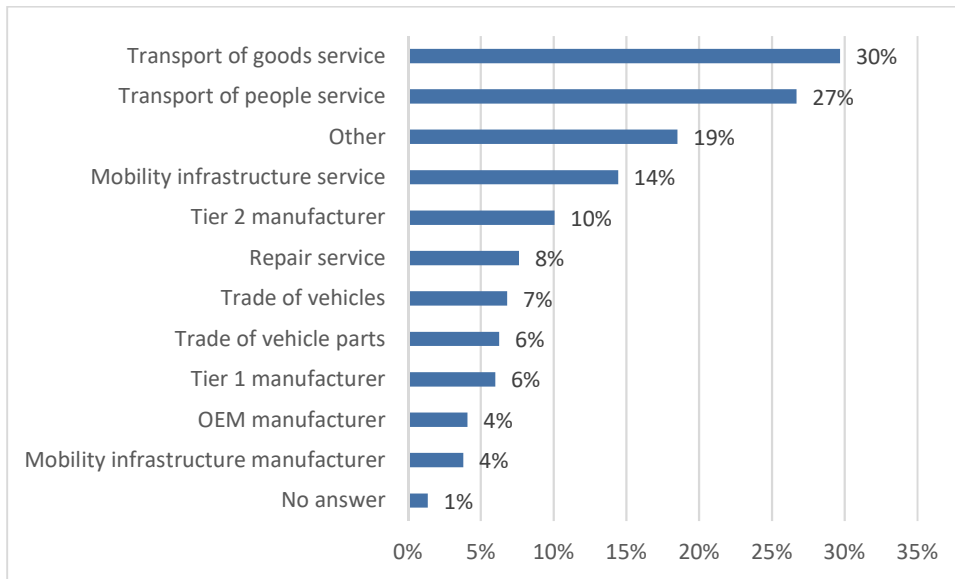
Partners gathered 367 responses from mobility sector companies from the following countries:

Figure 5 Respondents per main country of company activity



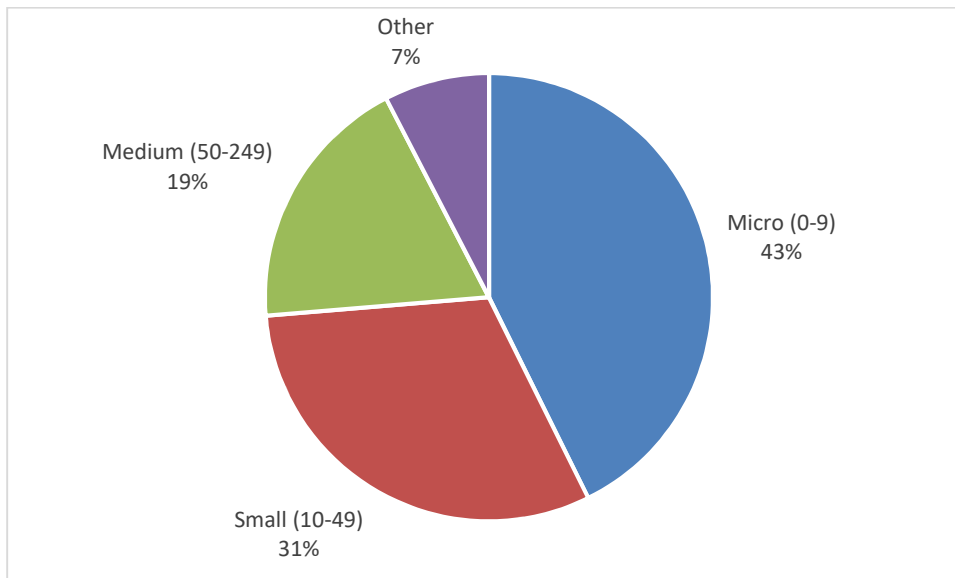
The main activity of the companies are transport of goods service (30% of responses) and transport of people service (27%). Following are companies within mobility infrastructure service (14%) and Tier 2 manufacturer (10%). The detailed information on the sector of activity of the respondents is presented below.

Figure 6 Sector of activity of the INNO-MOB SME survey respondents



Most of the companies taking part in the survey in terms of amount of employees are micro (43%), and small (31%).

Figure 7 INNO-MOB SME survey respondents' company size (employees)



In terms of turnover also micro companies (52%) and small (24%) dominate. The overview is presented in table below.

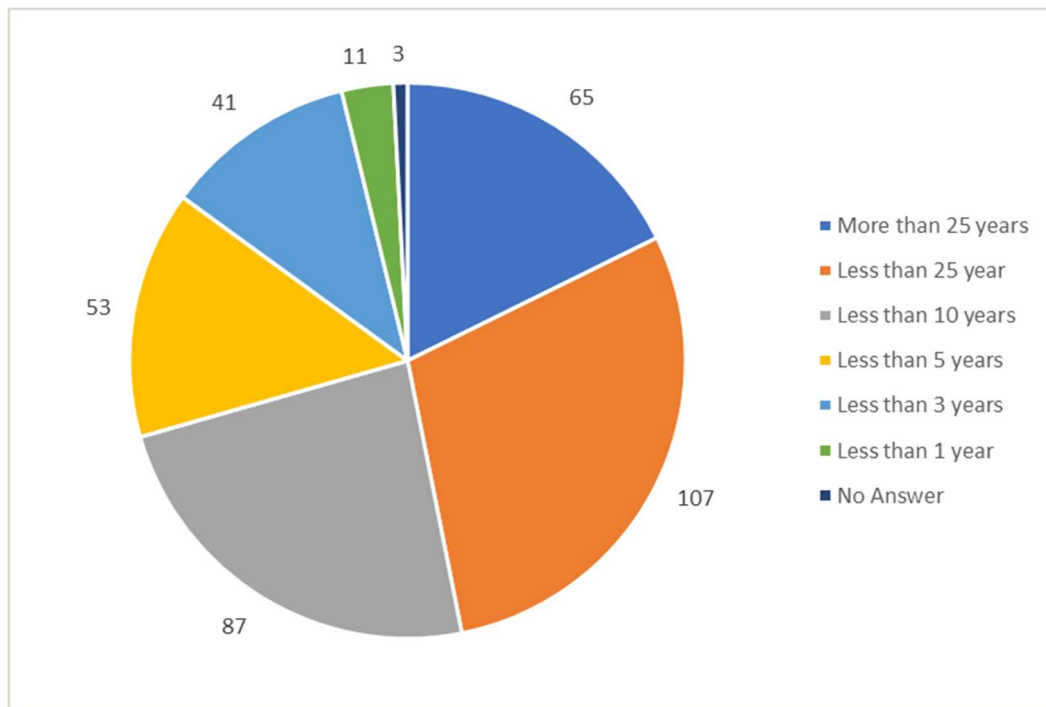
	No. of companies	% of companies
Micro (below €2 million)	191	52.04%
Small (below €10 million)	87	23.71%

Medium (below €50 million)	51	13.9%
Other	32	8.72%
No Answer	6	1.63%

Table 4 INNO-MOB SME survey respondents' company size (turnover)

The companies taking part in the survey are mainly mature SMEs: 172 of 367 are operating on the market more than 10 years. Only 52 are operating less than 3 years.

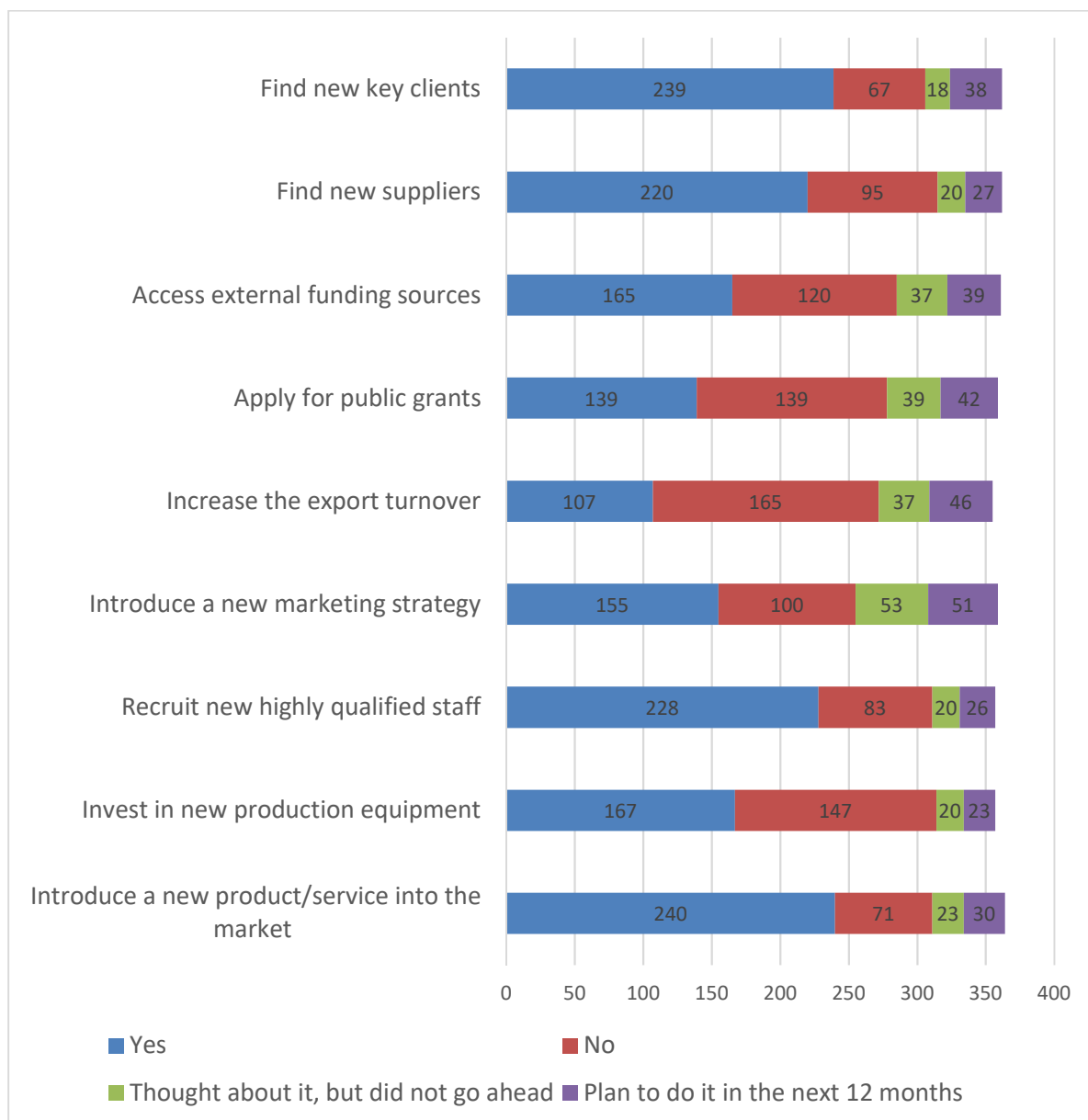
Figure 8 INNO-MOB SME survey respondents' company age



7.1 Enterprise strategies

Most popular strategic activities among the respondents is *introduction of a new product or service on the market* (240 performed this activity in the last 3 years out of 367 companies), second almost as much popular was *finding new key clients* (239 companies) and the third was *recruitment of new highly qualified staff* (228). The fourth most popular activity (*finding new suppliers* - 220) was also the last in order that exceeded 50% of answers, which means that the other were much less performed.

Figure 9 INNO-MOB survey results: enterprise strategy: achievements and plans.

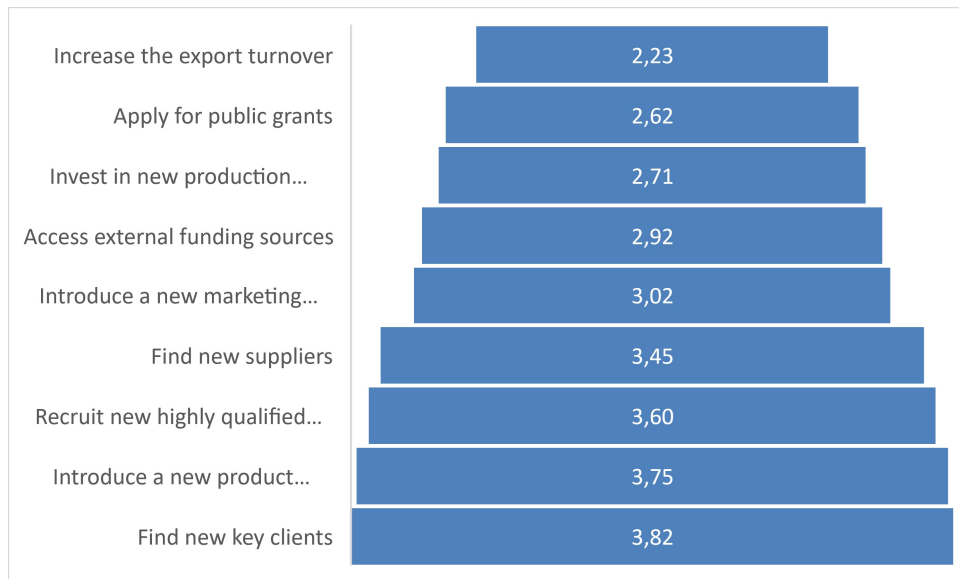


The most cumbersome activity (the companies *thought about them, but did not go ahead*) was the *introduction of a new marketing strategy*. 53 companies signalled it being problematic. Among others that might require assistance were: *applications for public grants* (39), *access to external funding sources* (37), *increase the export turnover* (37) and *introduction of a new product/service into the market* (23). The last activity, which needs overcoming some barriers, is also the most popular among companies. Hence, it should be within the focus of support services.

The *introduction of a new marketing strategy* is also one of the most pressing activities, as the biggest group of companies (51) has indicated it in the short terms plans (*plan to do it in the next 12 months*). The pressing activities coming next are: *to increase the export turnover* (46), *apply for public grants* (42), *access external funding sources* (39), *find new key clients* (38) and *introduce a new product/service into the market* (30).

The importance of the above issues normalised to the average assessment of respondents is shown on the graph below:

Figure 10 Significance of strategic issues for SMEs



7.2 Challenges

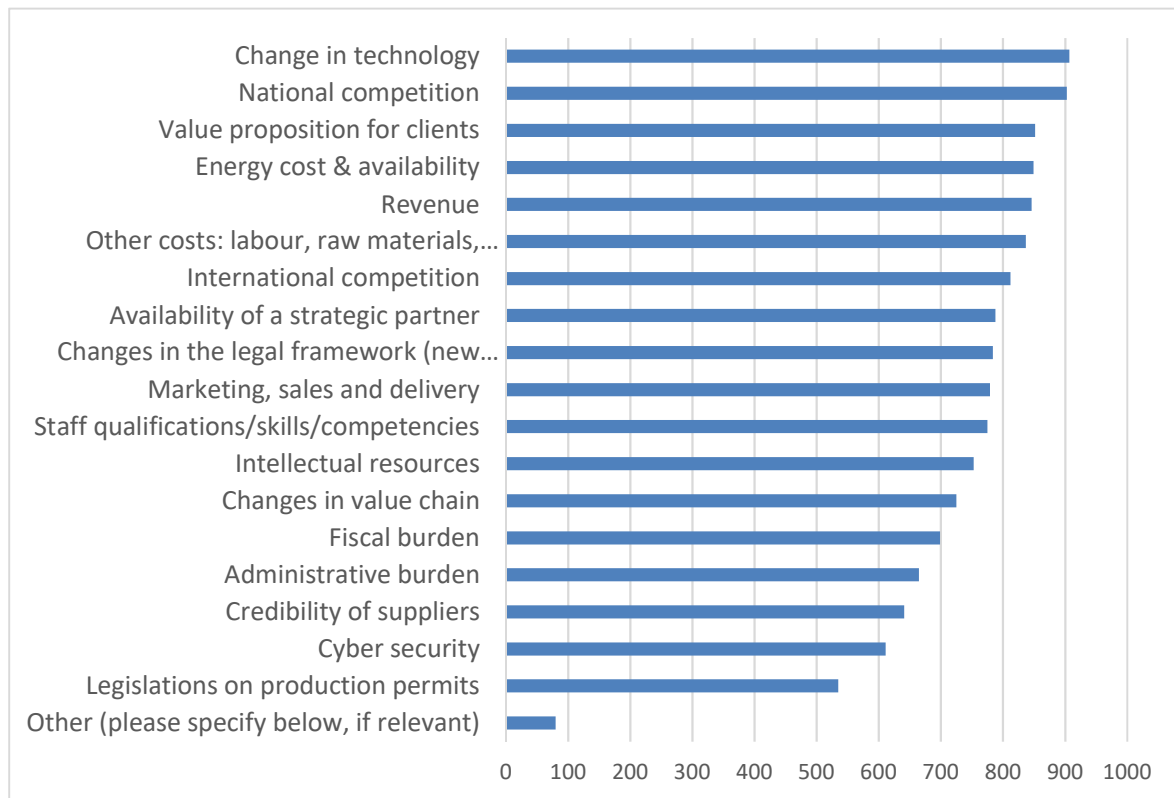
The most significant **challenges** the companies are concerned with include *trends related to the technology change, the competition, the costs and sales* (value for clients and revenue). IDIs with the actors of the ecosystem have given some insights into the technology issues, which in the first place concern suppliers of elements affected by the new EU regulation on zero-emission cars. However, the *change in technology* (76 respondents) along with the *value proposition* (84 respondents) is most frequently listed as an **opportunity**, which means that a large group of companies is interested and able to build their competitiveness on the new technologies and value for clients.

The list of the most significant challenges, estimated as a sum of weighted significance (0= We do not see any challenges, 1= I don't know/I don't have an opinion, 2= We see some challenges, 3= We see significant challenges, 5= We see them as an opportunity) assigned by respondents includes:

- Change in technology (907)
- National (903) and international competition (812)
- Value proposition for clients (852)
- Energy cost & availability (849) and other costs: labour, raw materials, components supply etc. (837)
- Revenue (843)

The ranking of the challenges calculated as above is shown on the graph below.

Figure 11 Challenges faced by companies: ranking of significance

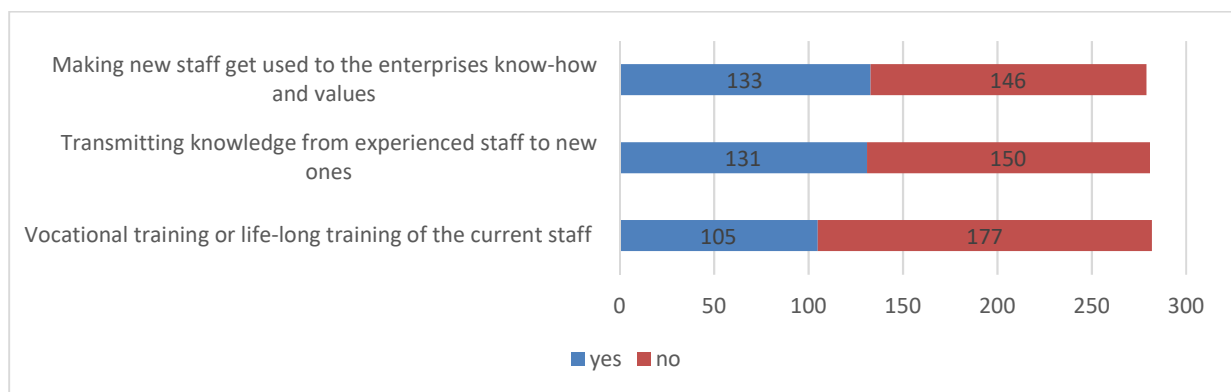


7.2.1 Specific challenges

Staff qualifications/skills/competencies

The companies, which indicated they encounter challenges related to *Staff qualifications/skills/competencies* were asked to provide more specific information about the training. Then the ones who declared they do not encounter problems in the field of **training** is slightly prevailing over the ones who do. At the first sight it might be interpreted as a contradiction, but the reason may be that the respondents do not see training as a solution to the problem staff qualifications/skills/competencies. As for the specific issues, the group of companies admitting to face training problems with *transmitting knowledge from experienced staff to new ones* and the group of companies which do not encounter such problems were almost equal (131 against 150). The similar situation we can observe in the case of *making new staff get used to the enterprises know-how and values* (133 against 146). Whereas for the issue of *vocational training and life-long training of the current staff* slightly more than one-third of companies (105 out of 282) declared to face such problems.

Figure 12 Companies declarations about training problems in specific fields



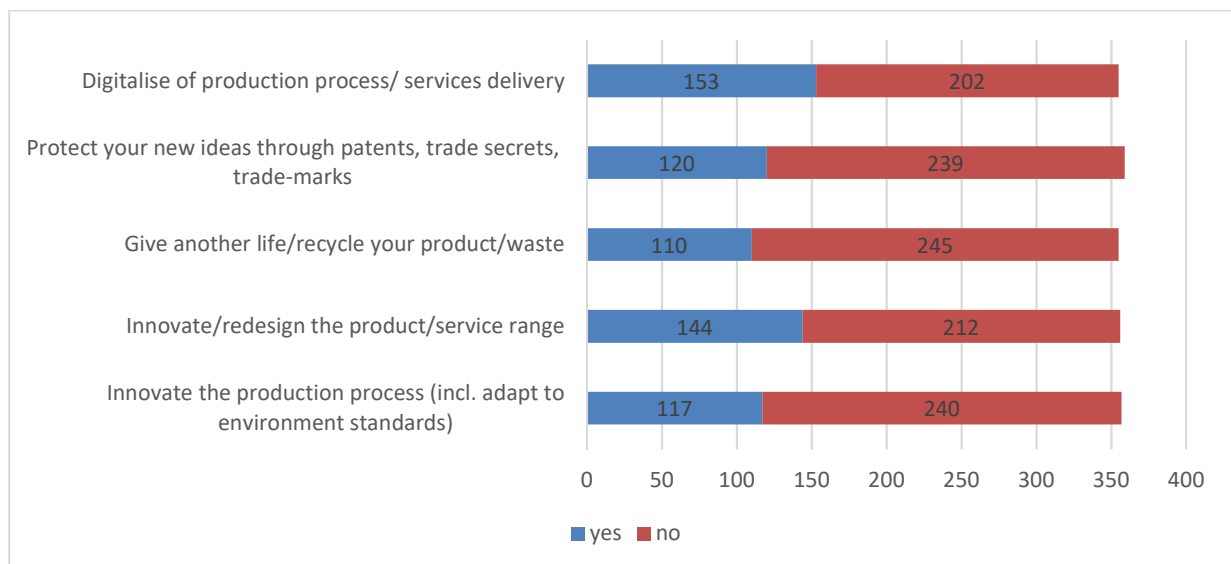
Question: *Are you facing training problems in the field of: ...?:*

Innovation

Companies that recognised as relevant challenges that might be answered by innovation (i.e. *value proposition, changes in the legislation framework, change in technology, intellectual resources, cyber security, national or international competition*) were asked to indicate more specific problems they face.

Among the companies which face barriers to introduce innovation the biggest group (40-43%) admitted they have problems to *digitalise production process or services delivery* and *to innovate or redesign the product/service range*.

Figure 13 Companies' declarations about specific problems/barriers to introduce innovation



Question: *Are you facing problems/barriers to: ...?*

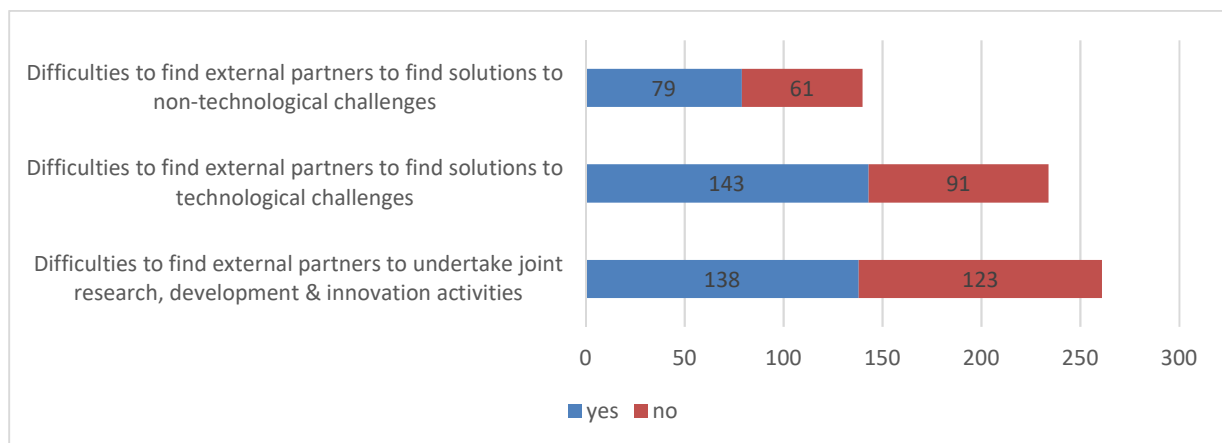
Majority of surveyed companies declare having encountered barriers in **finding external partners** to carry out specific activities. Only 130 companies provided their feedback about *difficulties to find external partners to find solutions to non-technological challenges* but 56% of them recognise barriers in this field. More than 60% of companies which answered the question declared they have *difficulties to find external partners to find solutions to*

technological challenges. As for *undertaking joint research, development & innovation activities* the group of companies admitting difficulties and the one declaring lack of problems in finding external partners are more equilibrated.

The fact that the majority of respondents asked about innovation-related barriers did not see specific problems might be interpreted in the light of the high innovation engagement of the respondents. For example, 240 of companies introduced a new or improved product on the market in the last 3 years and 30 companies plan to do so in the next 12 months. That means that they recognise the challenge and act up to it. Only 23 openly admitted difficulties i.e. declared that they thought about new or improved product introduction but did not go ahead. Among this narrow group, a majority (19) revealed at least one barrier and only 3 did not identify any barrier. Among the companies, which plan the introduction of a new or improved product in perspective of 12 months ahead, all identify at least one difficulty. It means that the problem of companies being totally unaware of their needs (“they do not know, that they do not know”) does not exist in the case of all respondents. Either they are active in innovation (i.e. introduced some type of product innovation in the last 3 years) or they are aware of innovation barriers. It does not mean that the awareness does not need to be deepened. The practical conclusion is however that there is always a starting point for the innovation support process, and it does not need to be started with the diagnostics process of need identification.

Sales and marketing

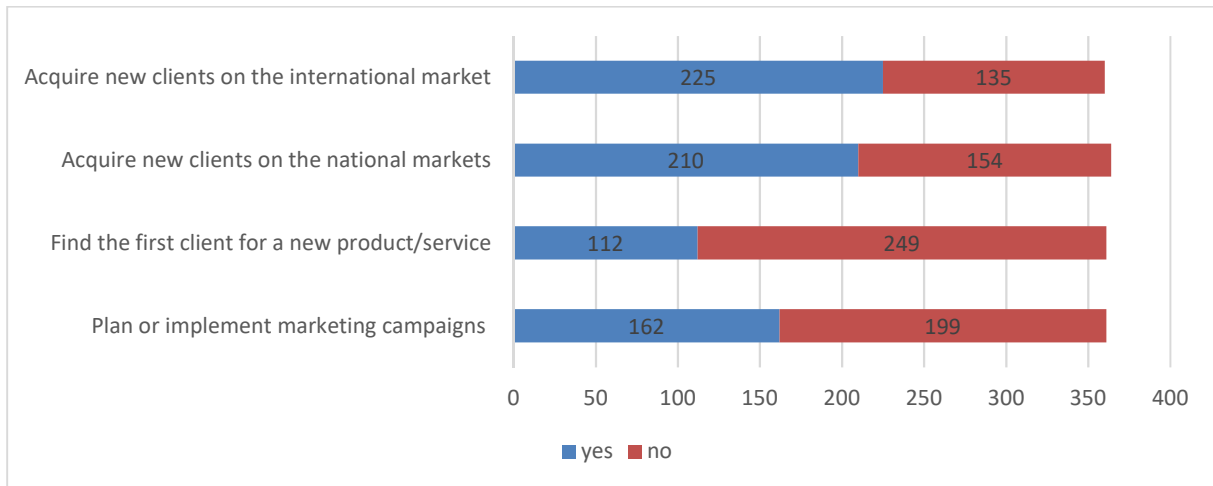
Figure 14 Companies’ declarations about barriers to find external partners to carry out specific activities.



Question: *Are you facing difficulties to find external partners to: ...?*

The companies, which indicated they encounter challenges related to *marketing, national or international competition, changes in the value chain, value proposition and revenue* were asked to provide more specific information about **challenges in sales and marketing**. More than half of companies admit facing issues with *acquiring new clients* both on *the international and the national market* whereas only 31% declare challenges in *finding new client for a new product or service* and 45% find challenging to *plan or implement marketing campaigns*.

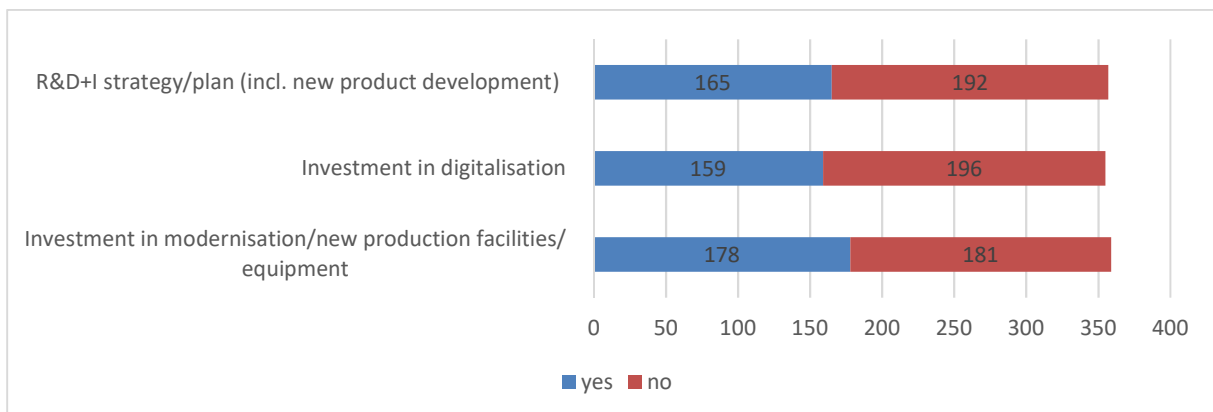
Figure 15 Companies' declarations about challenges in sales and marketing.



Question: *Are you facing challenges to:...*

The companies, which indicated they encounter challenges related to ... were asked to provide additional information about **difficulties to finance specific innovation activities**. In case of *investment in modernisation/new production facilities/ equipment* 50% of companies declared to face issues, followed by *R&D+I strategy/plan (incl. new product development)* (46%) and *investment in digitalisation* (45%).

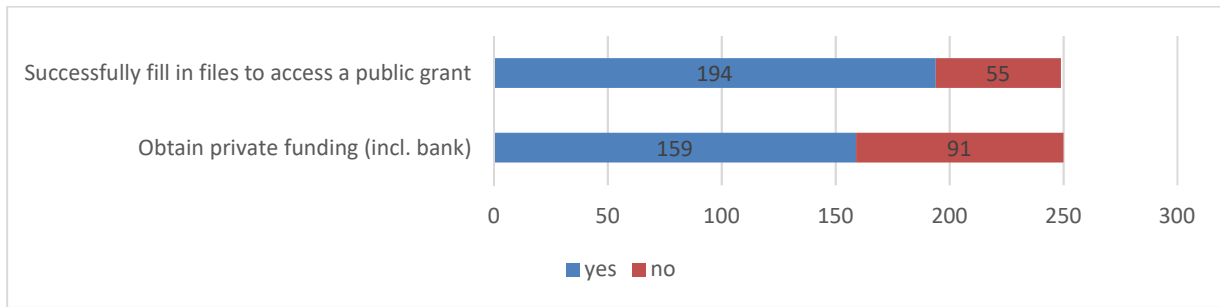
Figure 16 Companies' declarations about difficulties to finance specific activities.



Question: *Are you facing difficulties to finance:....?*

All respondents were asked to provide more information about **difficulties to access external funding sources**. 78% of companies declare they have difficulties to *successfully fill in files to access a public grant* and 64% find it difficult to obtain private funding (including bank loans). These numbers confirm that companies are most prone to recognise the financial barriers to their innovation performance, especially as for the access to public funding.

Figure 17 Companies declarations about difficulties to access external funding sources.



Question: *Are you facing difficulties to:...*?

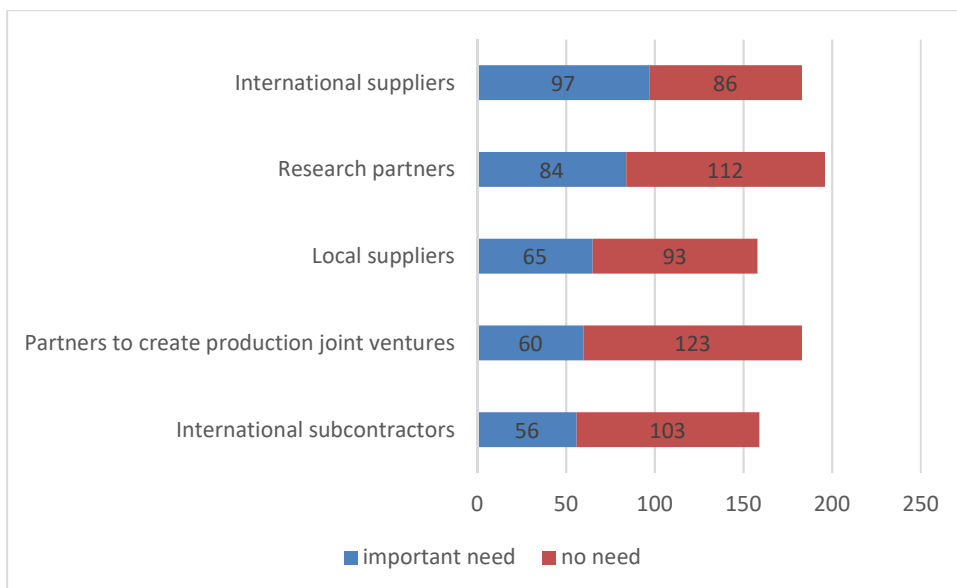
7.3 Assistance in finding partners

One of the most important services business support offers is help in finding partners. Consequently the companies were asked to rank their needs in this respect for different categories of potential partners. It might be striking to see that for almost all categories, except *international suppliers*, more companies do not see any need for assistance than those that rank this need very high (4) or as of utmost importance (5). But when the question is seen from the point of view of an SME, in the context of the complexity of the company's daily operation, it becomes obvious that the company depends on so many factors in so many aspects that finding a specific category of partners could not be seen as crucial at the moment of the survey.

Moreover, the companies are already involved in some networks of partnership and the need for new partners occurs only at specific timing when an innovation endeavour is planned. It means that the support services might be important but the business support needs to be able to provide the service to the right company at the right time, which is a challenge for BSOs.

The comparison of the ranking of the need for assistance in finding specific categories of partners is given below. It shows the number of indications that rank the need very high (4) and of utmost importance (5) as well as the lowest rank: no need (0).

Figure 18 Ranking of needs of companies to have assistance in finding given categories of partners.



7.4 Events

Companies were asked about their interest in taking part in different forms of events and satisfaction in case they had already used them. The companies' answers show that *info days on public funding* are events they are most interested in (only 34 indicated they are not interested in participating and 211 would participate such events if they were available). Second most attractive event indicated by surveyed companies is *networking with peers (e.g. Entrepreneurs' clubs)*. The two types of events are also among events companies used and were most satisfied with together with *international fairs abroad*.

Type of events/ Companies' experience and interest	I am not interested	I used it and I am not satisfied	I used it and I am satisfied	I would use it, if available	I don't know
Networking with peers (e.g. Entrepreneurs' clubs)	47	19	66	192	34
Info days on public funding (grants) opportunities	34	25	59	211	26
Meet with ... (mayor, university dean, big company etc.)	73	15	34	154	77
Investment fora	76	14	31	160	71
Subcontracting fairs	92	12	46	127	74
International fairs abroad	59	15	64	148	65
Seminars/ briefings/ demonstration regarding new production processes/technologies	70	16	44	155	68

Table 5 Companies' experience and interest in networking events.

7.5 Support service experiences

The majority of 367 companies which took part in the INNO-MOB survey have not used the services offered by the support networks yet. The least popular among companies is *Support to enter a specific foreign market* (277 companies declared they have never used such service) followed by *IPR (e.g. advice on patents, licencing, know-how protection)* (236), *Greening products & processes (e.g. CO2 footprint, LCA, ESG)* (227), *Access to infrastructure and RTD resources (e.g. database)* (224), *Industry interest representation & lobbying* (224). Only in case of 4 types of services out of 14 included in the survey slightly less than half of companies declared that they never used the service, namely: *Support in marketing and promotion* (166), *Access to finance (loans, grants, investors etc.)* (171), *Digitalisation support* (181) and *Networking (e.g. with peers, bigger companies, RTD etc.)* (184). In case of *Support in marketing and promotion* (107) and *Access to finance* (100) more than a quarter of surveyed companies declared that they have used the service and were either satisfied or not satisfied. Among other services that companies have experience with are: *Digitalisation support* (90), *Networking* (89), *Competencies and HR issues support (e.g. training)* (80).

On the other hand the relation between the number of companies satisfied and not satisfied with the service demonstrates that the clients are most happy with services which are not always among most experienced. The leading is *New product development* (rate 8,29) only used by 65 companies followed by more popular *Networking* (7,09) and *Support in marketing and promotion* (6,64) back again to less popular *Support to find new suppliers* (6,33) and

Access to infrastructure and RTD resources (e.g. database) (5,88). Commonly used services like *Access to finance*, *Digitalisation* and *Competencies and HR issues support* show relatively low rates between satisfied and dissatisfied clients (between 3,5 and 3). The lowest ratio (below 3) can be observed in case of two services which are also not the most experienced by surveyed companies, i.e. *Support to enter a specific foreign market* and *Industry interest representation & lobbying*.

The indications by surveyed companies per each service are presented in the table below.

Type of service/ answer provided by companies	Support to enter a specific foreign market	Support in marketing and promotion	Support to find new suppliers	Networking (e.g. with peers, bigger companies, RTD etc.)	Access to infrastructure and RTD resources (e.g. database)	Digitalisation support	Energy efficiency related support	Greening products & processes (e.g. CO2 footprint, LCA, ESG)	Business model (or strategy) innovation	New product development	IPR (e.g. advice on patents, licencing, know-how protection)	Competencies and HR issues support (e.g. training)	Industry interest representation & lobbying	Access to finance (loans, grants, investors etc.)
I have NOT used such a service	277	166	214	184	224	181	211	227	207	216	236	207	224	171
I have used and was satisfied	49	93	57	78	47	70	46	38	54	58	41	62	42	75
I have used, but was NOT satisfied	21	14	9	11	8	20	15	10	16	7	12	18	20	25
Relation: satisfied/not satisfied	2,33	6,64	6,33	7,09	5,88	3,50	3,07	3,80	3,38	8,29	3,42	3,44	2,10	3,00

Table 6 Companies' experience with support services.

Surveyed companies are most interested in using 5 types of services in next 12 months (more than a third of companies declared so): *Access to finance (loans, grants, investors etc.) (188)*, *Networking (164)*, *Energy efficiency related support (142)*, *Support to enter a specific foreign market (134)* and *Support to find new suppliers (123)*. Among services which most companies would not use in next 12 months (more than 100 indications) are *Industry interest representation & lobbying* and *Competencies and HR issues support*.

In case of 5 types of services more than 85 surveyed companies declared they would need more information to decide, if they are interested in using such a service in next 12 months, i.e. *Support to find new suppliers*, *Networking*, *Greening products & processes (e.g. CO2 footprint, LCA, ESG)*, *Business model (or strategy) innovation* and *IPR (e.g. advice on patents, licencing, know-how protection)*. Among services companies are least interested in using in the nearest future are *Industry interest representation & lobbying* and *Competencies and HR issues support (e.g. training)* (more than a 100 of respondents declared so).

The declared interest of companies in using specific services in nearest future is presented in the table below.

Type of service/ answer provided by companies	Support to enter a specific foreign market	Support in marketing and promotion	Support to find new suppliers	Networking (e.g. with peers, bigger companies, RTD etc.)	Access to infrastructure and RTD resources (e.g. database)	Digitalisation support	Energy efficiency related support	Greening products & processes (e.g. CO2 footprint, LCA, ESG)	Business model (or strategy) innovation	New product development	IPR (e.g. advice on patents, licencing, know-how protection)	Competencies and HR issues support (e.g. training)	Industry interest representation & lobbying	Access to finance (loans, grants, investors etc.)
I am interested in using such a service in next 12 months	134	106	123	164	87	119	142	104	114	112	95	100	87	188
I am NOT interested in using such a service in next 12 months	61	70	92	37	97	80	85	92	64	88	91	108	115	51
I would need more information to decide, if I am interested in using such a service in next 12 months	78	55	64	33	98	86	60	88	105	82	89	67	76	57

Table 7 Companies' interest in support services.

Looking deeper into the answers provided by companies in the survey we can learn that in the group of companies which declare that they never used a specific service *Access to finance*, *Energy efficiency related support* and *Support to enter a specific foreign market*

D2.2 Gaps Vignette report

there is biggest interest in using such services in nearest future. On the other hand for this group of companies *Industry interest representation & lobbying* and *Access to infrastructure and RTD resources* are least interesting in the nearest future followed by *Competencies and HR issues support* and *Greening products & processes*. Companies which declare that they never used a specific service are most interested to learn more about *Business model (or strategy) innovation*, *Access to infrastructure and RTD resources* and *Greening products & processes* before deciding to use such services for the first time.

Type of service/ answer provided by companies	Support to enter a specific foreign market	Support in marketing and promotion	Support to find new suppliers	Networking (e.g. with peers, bigger companies, RTD etc.)	Access to infrastructure and RTD resources (e.g. databases)	Digitalisation support	Energy efficiency related support	Greening products & processes (e.g. footprint, CA, CO2)	Business model (or strategy) innovation	New product development	IPR (e.g. advice on patents, protection)	Compliance and IPR issues support (e.g. training)	Industry interest representation & lobbying	Access to finance (loans, grants, investors etc.)
I have NOT used such a service and I am interested in using such a service in next 12 months	69	53	53	57	27	36	67	45	38	46	48	43	33	75
I have NOT used such a service and I am NOT interested in using such a service in next 12 months	48	44	55	23	72	44	55	65	43	58	60	66	81	27
I have NOT used such a service and I would need more information to decide, if I am interested in using such a service in next 12 months	47	28	44	62	69	56	36	65	75	53	62	38	52	26

Table 8 Interest to use services among companies who NEVER used them.

The other group of companies are the ones which used the analysed support services and were satisfied with them. The services companies are planning to use in the nearest future are *Support in marketing and promotion*, *Access to finance* and *Networking*.

Type of service/ answer provided by companies	Support to enter a specific foreign market	Support in marketing and promotion	Support to find new suppliers	Networking (e.g. with peers, bigger companies, RTD etc.)	Access to infrastructure and RTD resources (e.g. databases)	Digitalisation support	Energy efficiency related support	Greening products & processes (e.g. footprint, CA, CO2)	Business model (or strategy) innovation	New product development	IPR (e.g. advice on patents, protection)	Compliance and IPR issues support (e.g. training)	Industry interest representation & lobbying	Access to finance (loans, grants, investors etc.)
I have used and was satisfied and I am interested in using such a service in next 12 months	23	49	27	44	20	32	28	21	27	28	16	22	14	44
I have used and was satisfied and I am NOT interested in using such a service in next 12 months	4	11	10	9	7	10	3	4	3	9	7	15	12	9
I have used and was satisfied and I would need more information to decide, if I am interested in using such a service in next 12 months	5	5	1	6	4	9	3	1	9	7	6	7	3	7

Table 9 Interest to use services among companies who were satisfied.

Access to finance is the service that the largest group of companies plan to use shortly despite the fact they were not satisfied with it - 14 declared so.

Type of service/ answer provided by companies	Support to enter a specific foreign market	Support in marketing and promotion	Support to find new suppliers	Networking (e.g. with peers, bigger companies, RTD etc.)	Access to infrastructure and RTD resources (e.g. databases)	Digitalisation support	Energy efficiency related support	Greening products & processes (e.g. footprint, CA, CO2)	Business model (or strategy) innovation	New product development	IPR (e.g. advice on patents, protection)	Compliance and IPR issues support (e.g. training)	Industry interest representation & lobbying	Access to finance (loans, grants, investors etc.)
I have used, but was NOT satisfied and I am interested in using such a service in next 12 months	9	6	5	7	4	8	10	3	7	4	3	6	5	14
I have used, but was NOT satisfied and I am NOT interested in using such a service in next 12 months	2	3	0	1	0	1	0	1	2	1	2	5	5	4
I have used, but was NOT satisfied and I would need more information to decide, if I am interested in using such a service in next 12 months	3	2	1	1	1	3	2	0	2	0	2	4	2	2

Table 10 Interest to use services among companies who were NOT satisfied.

For the companies which were not satisfied with the support services the most important reasons for dissatisfaction were linked to the service outcome (companies declared either *The outcome of the service was not good enough* or *The outcome of the service was not useful*). The third most significant reason for dissatisfaction was the timing (*The service took a too long time*) followed by insufficient staff competence (*The staff did not have enough of professional knowledge/skills*). The least important reasons for companies being dissatisfied with the service refer to premises appearance (*There was a mess on the premises of the service providers*). Also the role of documentation appearance and quality of equipment are not crucial factors of companies satisfaction with the service.

Reason for being dissatisfied with the service	Not the case	Importance
The outcome of the service was not good enough	9	297
The outcome of the service was not useful	12	285
The service took a too long time	11	265
The staff did not have enough of professional knowledge/skills	13	245
The staff was not flexible with my limitations/problems	18	206
The time availability (e.g. hours) was not convenient	19	194
The staff was not interested in my specific issue	26	188
The staff did not keep promises	25	179
It was difficult to find the specific people/room	28	155
I felt unsure when transacting with the staff	32	150
The service provider focused more on their needs than on mine	34	149
The service provider used outdated equipment	35	139
The service provider did not keep the documentation for my case in order	31	135
There was a mess on the premises of the service providers	40	108

Table 11 Reasons for companies' being dissatisfied with the service.

[Not the case = number of indications; Importance = sum of weighted significance (5- most important, 1-least important)].

The importance of the **outcome related factors of companies satisfaction** was confirmed by those companies who were satisfied with the service. The most important for them was the **usefulness of the service outcome and its quality**. The other important elements pointed out by companies were related to **reliability** (*The staff was highly professional/skilled, The staff kept promises*), **empathy** (*The service provider was focused on my case in order to provide the best solution, The staff was interested to know more about my specific issue, The staff was flexible with my limitations/ problems*) and **responsiveness** to clients' needs (*The service took appropriate time, The time availability (e.g. hours) was convenient*). The role of **tangibles** being least significant, including such elements as up-to-date equipment as well as neat and customer friendly organisation of premises of service providers.

Reason for being satisfied with the service	Not the case	Importance
The outcome of the service was useful	4	768
The outcome of the service was of high quality	4	724
The staff was highly professional/skilled	3	694
The service provider was focused on my case in order to provide the best solution	5	685
The service took appropriate time	4	683
The staff was interested to know more about my specific issue	3	671
The staff kept promises	7	663
The time availability (e.g. hours) was convenient	5	657
The staff was flexible with my limitations/problems	3	654
It was easy to find the specific person/room to take care of my case	11	581
The premises of the service providers were neat and customer friendly	11	548
The service provider used modern equipment	16	541

Table 12 Reasons for companies being satisfied with the service.

[Not the case = number of indications; Importance = sum of weighted significance (5- most important, 1-least important)].

8 Service supply data analysis: Ecosystem Stakeholders

8.1 Issues researched

The purpose of the in-depth interviews with the mobility support ecosystem stakeholders was to characterize the range of services offered for SMEs as the whole system functioning set up as a response to the needs of mobility sector SMEs, including such concerns as the stakeholders' perception of SMEs' situation and their needs factors influencing the design and delivery of the service as well as the communication about the service.

The interview was structured around similar issues as in the SME survey with the purpose of enabling gap analysis. It contained both quantitative and qualitative questions as a mixed approach was used.

The interview scenario was based on the list of Indicators (see the table below), which were translated the scenario questions.

Indicator	Objective
<p>Mandate and business model</p> <p>Variables: legal status, mandate, main activities and source of funding</p>	<p>To identify the role the organisation has in the support ecosystem determined by its mandate and business mode.</p> <p>The assumption is that the public organisations have permanent public funding and a top down mission, whereas consultancy companies are based on market rules. Many support organisations are in between these two with the mixed arrangement of variables of mission (top down, bottom up) and funding (public project based, membership fees and service fees).</p>
<p>Target group focus</p> <p>Variables: focused on SMEs in the mobility sector and not focused</p>	<p>To understand how the stakeholder defines the target group and, if their target group is larger (all SMEs in a given area) understand</p>

	how important is mobility sector for the organisation.
Perception of the mobility sector SMEs' needs Variables: the wording used by the respondents when defining their target group SMEs' needs; sources of knowledge about SMEs needs	To understand the perception of the SMEs needs by the support ecosystem actors and its rooting sources of knowledge, including interaction with the SMEs themselves
Reaching out to the SMEs Variables: means of communication and wording used in defining how the SMEs learn about the services offered	To understand the perception by the support ecosystem actors and the perception source
Client (SME) satisfaction measurement systems Variable: existence or not existence of satisfaction measurement systems and the sources of knowledge about customer satisfaction; perception of the customer feedback	To understand how the ecosystem stakeholder acquire the feedback from the SMEs on the support provided
Definition of the value of support services for SMEs Variable: importance of the quality aspects: list by SERVQUAL model - Parasuraman et al., (1988)) on Likert scale	To understand which aspect of service quality the ecosystem stakeholders consider as most important for the value of their services.
Flexibility & adjustment of the support offer Variables: fully flexible and restricted flexibility (e.g. by procedures, resources etc.)	To understand how the ecosystem stakeholders adjust the support offer in response to the feedback from SMEs
Collaboration within ecosystem Variables: the types of the actors the stakeholders collaborate with, the perception of value of the collaboration and the perception of problems hampering the collaboration	To understand how ecosystem stakeholders collaborate with each other

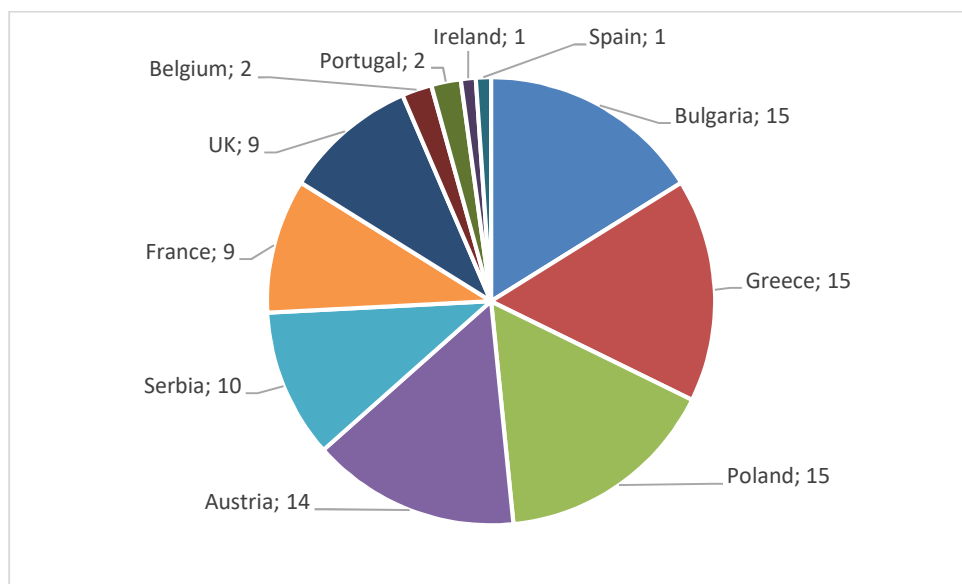
Table 13 Indicators and objectives of INNO-MOB IDI.

8.2 IDI statistics

The Individual In-Depth Interviews (IDI) among innovation actors, who are actual and potential members of the network, were carried out by INNO-MOB partners in May and June 2023. Partners used the IDI scenario prepared by WP2 Leader and presented results in the answer template. The data collected will serve for gap analysis in the next steps.

Partners collected information from 93 entities operating in 11 countries from EU and outside as presented in the graph below.

Figure 19 IDI respondents' origin.



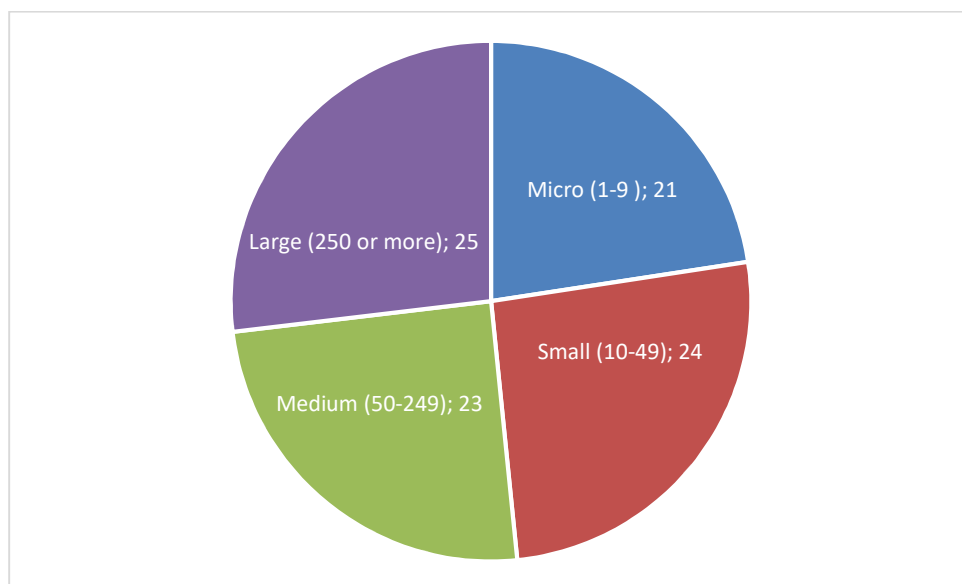
The interviewed stakeholders represent different types of entities, including mostly *clusters* (14), *SMEs*, (10) and *business support organisations* (10) as well as *sectoral associations*, *public (incl. sectoral) agencies*, *regional and local authorities*, *chambers of commerce*, *research organisations*, *incubators and accelerators*, *science parks*, *universities*, *infrastructure and (public) service providers*, *NGOs*, *interest groups* and one *large enterprise*.

Figure 20 IDI respondents' types of organization.

Institution type	Number
Cluster	14
Other business support organisation	10
SME	10
Sectoral association	8
Regional/local authority	7
Public (incl. sectoral) agency	7
Research organisation	6
Incubator/accelerator	6
Chamber of commerce	6
Science park	5
University / higher education institution	4
Infrastructure and (public) service provider	3
NGO	3
Interest group	2
Large enterprise	1
Other	1

The interviewed entities are also much differentiated in terms of no. of employees. Large, medium, small and micro entities are almost equally represented in the analysed group.

Figure 21 IDI respondents' no. of employees



Networking services are present in the services portfolio of most of the stakeholders interviewed. Among most available support services are also: *business model (or strategy) innovation* and *new product development*. The least popular is the *IPR support*, followed by *energy efficiency-related support* and *digitalization*.

Type of services	No of providers
Networking (e.g. with peers, bigger companies, RTD etc.)	72
Business model (or strategy) innovation	65
New product development	58
Access to finance (loans, grants, investors etc.)	53
Competencies and HR issues support (e.g. training)	51
Support to find new suppliers	50
Greening products & processes (e.g. carbon footprint calculation, LCA, ESG compliance)	49
Access to infrastructure and RTD resources (e.g. database)	46
Industry interest representation & lobbying	42
Support to enter a specific foreign market	41
Support in marketing and promotion	41
Digitalisation	41
Energy efficiency-related support	38
IPR (e.g. advice on patents, licencing, knowledge & know-how protection)	37

Table 14 IDI respondents' services offered

8.3 IDI content analysis

8.3.1 Support stakeholders' mandate and business model

28 institutions are *public* and their mandate is defined by the law. The rest (65) can be considered a *private* or *semi-private*, their mandate comes from the business and may be influenced partially by the public mission through public funding/co-funding.

Source of funding of innovation actors interviewed which was most mentioned was the *project funding* (51 actors mentioned this source of funding). The next was the *public funding*

(44 statements) and services fees (42 mentions). Membership fees were mentioned by 24 actors. The least mentioned sources were: *private funding* (8), *sponsoring* (6), *rent of infrastructure* (2), and *equity* (1).

8.3.2 Target group focus

54 stakeholders are strictly focused on the **mobility sector** while the remaining ones define their target groups more widely. For some of them the target group also include: **authorities** (14 mentions), **research organizations** (7) and **society** (including mobility service and road users) – 6 mentions.

8.3.3 Perception of the mobility sector SMEs' needs

In the opinion of respondents the most important need of their clients is *access to finance* (32 mentions), next are: *competences and HR issues support* (22 mentions), *finding partners for innovation* (16 mentions), *support in marketing and promotion* (15), *access to market* (14), *access to infrastructure and RTD resources* (8), *networking* (8 mentions), *new product development* (7), *business model development* (7), *adaptation to legal requirements* (6), *support to enter a specific foreign market* (6 mentions). What is interesting only 1 innovation actor thinks that *IPR support* is needed by SMEs. Also the need in support in twin transition is not considered as important need: only 3 mentions *supporting greening produces and processes* and 5 *digitalisation support*.

Having in mind specific needs of mobility sector in competences development the foreign language skills (especially English) is recognised as an important barrier to collaborate internationally. Collaboration of transport and mobility companies within clusters offers them possibility to leverage technologies and competencies that might not be available internally.

Taking into account technological needs the significant issue is transformation of the sector from combustion engines technologies to zero emission technologies. The challenges are: energy storage, batteries, technologies related with vehicle software as well as autonomous driving.

During the in-depth-interviews the innovation actors highlighted that there is a problem with SMEs real needs identifying. One of the respondents said: *the actual needs are not the ones companies come with*. The other respondent *SMEs says: give us grant or a loan and we will manage to run our business*. The overall perception of the innovation actors is that companies articulate their financial needs, but it is very difficult for them to identify other needs, which are also significant. Companies find it difficult to understand that their businesses are or will be soon affected by: megatrends and mega problems (sustainability, climate change, energy transition and mobility transition, global crises) , new life concepts (life-work balance, ownership less important), fulfilling environmental regulation, availability/supply of raw materials.

The innovation actors are identifying their clients' needs mainly via direct contacts in everyday communication (50 mentions) and during workshops and trainings (38 mentions). This shows that in majority of support organisations the identification of clients' needs is not a priority as it is not formalised process and can cause a misunderstanding of actual companies' needs. Nevertheless 33 respondents mentioned that they carry out regular surveys (usual yearly) among companies, but some of them admit that this is not a relevant

source of information of companies' needs. The reason might be either the construction of the survey itself (e.g. asking companies directly "what are your needs?" leads to the most frequent answer about the external financing) or the fact that the surveys carried out usually once a year cannot reflect the dynamics of changing needs of companies that might evolve during 12 month-time reflecting specific activities and projects taken by companies. Some of innovation actors rely on market research outcomes (e.g. published surveys, literature and good practices, market research, analysis to identify the trends, stakeholder analysis, SWOT analysis). There are cases that the IDIs or working groups are organised aimed at companies needs identification.

8.3.4 Reaching out to the SMEs

The analysis of the IDI results concerning communication is not highly conclusive. The respondents did not elaborate on open questions just listed the channels the SMEs use to "get to know" about their services. Which need to be interpreted more on the channels used that their effectiveness.

The channels of reaching the target groups are mainly website and social media (61 mentions), which is quite obvious are cost effective mean of communication with clients. The next most popular are events (info days and conferences) (50), newsletters (27), word-of mouth (19), daily contacts (18), networks (16), e-mails (13), meetings (12). Less popular means of reaching target groups are: fairs (6), targeted communication campaigns (3), scientific papers (1).

Taking into account the scarce presence of mentions of use of networks as means to reach out to SMEs and low level of reflection on the communication this aspect should be treated as a sphere to improve.

8.3.5 Client (SME) satisfaction measurement systems

Most of the respondents rely on *direct feedback from their clients* as satisfaction measurement (78 mentions), which includes both *satisfaction/evaluation questionnaires* as post-service assessments and *direct comments* provided personally during live meetings and phone interviews with clients. The feedback collection may have formal (formalised and regular tutoring meetings) and informal character (personal talks/ phone calls and meetings). Some respondents use working groups or WhatsApp groups formula, including specific applications. [Citation: *Communication through our mobile application is the most convenient and efficient way for us to stay connected with our members. It allows us to receive instant feedback, including reviews and ratings, which helps us monitor our performance and address any concerns or issues promptly.*] There are cases of collecting feedback and impact evidence statements. There are also some cases of organisations having specific KPIs defined and measuring this way quality of their performance. [Citation: *Performance indicators: The organisation monitors and report some key performance indicators, such as the number of start-ups supported, the amount of funding raised, the number of jobs created, or the number of international partnerships established, proportion of students continuing on to a master's degree; feedback from businesses about the work of students who have been interns or employed by them.*]

Some of the interviewed organisations use the *satisfaction surveys* (38 statements) usually carried out on yearly basis, which in several cases are linked to *ISO quality system* applied in the organisation. Only three organisations have their *CRM system*.

As for the content of the feedback received from their clients the respondents were significantly more keen on providing details on positive comments. The most common positive feedback from companies range from *professionalism of staff* (16 indications), through *flexibility in answering new trends* (13) and *good service quality* (11) to *time of delivery/keeping deadlines* (11). Respondents relatively frequently mentioned companies positive feedback related to *wide range of services* (8) and their *availability* (6). Specific result-oriented positive reviews linked to companies improved performance, i.e. *increase of employment, revenue or clients* were only mentioned once each.

Among negative feedback elements shared by the respondents the most common was (similarly to positive feedback) *time of delivery* (17), including: *time of delivering the offer for company, long waiting time for orders, delivery of services, delays in project completion, delayed response, long decision processes*. The other relatively important elements of support services generating negative feedback of companies were: *paperwork* (7) *limited availability* (5) and *not visible value for the company* (4). Only a couple of statements about negative feedback were related to *companies being over contacted* (2), *service not meeting their expectations* (2) *not enough range* (2) or *high cost of services* (2).

8.3.6 Definition of the value of support services for SMEs

The IDI respondents see *The usefulness of the service outcome for each client* as most valuable element of their services. The second most valuable is *The professional knowledge/skills of staff* followed by *The staff focused on hearing the client and their issue* and *The quality of the service outcome (e.g. report)*. They attribute least value to *The convenience of the time availability for clients, Timely delivery process* and *The flexibility of procedures to respond to client limitations/problems*.

Quality aspect	Value (cumulative)	Value (scale1-5)
The usefulness of the service outcome for each clients	382	4,15
The professional knowledge/skills of staff	346	3,76
The staff focused on hearing the client and their issue	325	3,53
The quality of the service outcome (e.g. report)	322	3,50
The professional behaviour of staff (e.g. specific timing for each step of the service)	312	3,39
Confidentiality of the customer information	302	3,28
The flexibility of procedures to respond to client limitations/problems	288	3,13
Timely delivery process	282	3,07
The convenience of the time availability for clients	270	2,93

Table 15 Quality elements of the support services

8.3.7 Flexibility & adjustment of the support offer

37 stakeholders declare they are always adapting to the SMEs' needs and have no procedural constraints in doing so. The adaptation is mostly with the individual approach to each client: [*We can adapt to every customer need*]; [*We tailor our services based on individual client requirements*]; [*Services are tailor made, always adjusted to clients' needs*]; [*conduct thorough analysis and assessment of their needs, and develop customised solutions accordingly*]; [*assessment of the needs of each company and offering targeted support*].

For some stakeholders, the flexibility consists in the themes of the events: workshops or training for the client. It does not include individual support for SMEs in reaction to the new need identified.

12 stakeholders declare they have a continuous process of discussions with the partners and internally the observations of the market trends and SMEs feedback: [*continuous follow-up of the market, market trends and standards, as well as continuous development, improvement and adaptation of our products and services according to the legislations applied in each country*]; [*Continuous discussion and direct communications*], [*No structured procedure. Work directly and closely with the partners*]; [*since the needs change and the situation is very dynamic from side of EU (innovations ecosystems, place based innovation), we adjust and refocus our activities. Need to do so also comes from the market side, where consumer needs and behaviour change, some issues fade out, and others pop up*].

2 stakeholders see the need to match the expertise (internal and external) to the SMEs; needs: [*constantly increasing the expertise of our team*]; [*selecting appropriate experts*].

One stakeholder declared the development of a new service based on the client feedback: [*During the last year we have developed an additional service in response to the customers' needs and the market*].

19 stakeholders declare they have some restrictions to the adaptation of the services, mostly related to the legal requirements or the rules of the projects, within which the services are provided. However none of them sees such restriction as a blocking factor to adapt to the changing needs. It may however delay the response: [*sometimes we are perceived to be too slow in adjustment*].

5 stakeholders have specific procedures for reflecting on the customer needs and introducing changes: [*we analyze the requests we receive at regular intervals and adapt our services according to the university's policy*]; [*We ask companies which trainings they want. We provide a list of 10 areas and then determine the top three topics based on the highest number of votes. Afterwards, we hold a meeting to discuss the format of the training, whether it will be lectures, full-day or half-day workshops, or speakers delivering a 30-minute presentation. This is our Cluster Academy, where we cover one topic per month*]; [*on a yearly basis during the strategy meetings we are able to finetune our services. Major changes need approval resp. assignment by the board which in turn needs to be reflected in the new strategy of the organisation*].

8.3.8 Collaboration within ecosystem

Collaboration within ecosystem is common practice in innovation actors' organisations. Their widespread collaboration with authorities might result from the fact that they are grand providers as well as animator of local and regional policies. The next are: research organisations (27 mentions), sectoral associations (23), public (including sectoral) agencies (21), universities/ higher education institutions (21), clusters (19), sectoral (mobility) initiatives (13), other business support organization (13), large enterprises (13), chambers of commerce (13), incubators/accelerators (10), SMEs (10), science parks (8), financial institutions (7).

The value of the collaboration within ecosystems in the opinion of innovation actors is the following: exchange of information and experiences (31 mentions), added value for the clients (24), joint projects (23), synergies as well as identification and avoiding overlaps (23), Insight in clients' needs (14), lobbying (14). Only 10 respondents mentioned access to potential clients as value of collaboration within ecosystem, which can be caused by high competition between innovation actors as well as limited trust between them.

Problems seen in collaboration within ecosystem are: different institutional agendas (27 mentions), limited resources for collaboration (18), Overlaps and unclear roles (11), competition for clients (7), low effectiveness of such collaboration (5), lack of trust (5). Minor problems mentioned are: paperwork/bureaucracy (4), distribution of effort and benefit (3), keeping the same quality in the network (3), IPR management (2), competition for staff (2), lock in recycling the same group of clients (2), regulatory frameworks different between countries (1), cultural differences (1).

9 Mobility Innovation Service Gaps Analysis

This section describes the results of the comparative analysis of the above presented information of the results of the research on “two sides”: supply and demand of innovation support in mobility sector. The aim of the analysis was:

- to investigate the gaps in the services provided by the networks/initiatives
- to identify missing elements and features for customization of the existing services within the national support ecosystems.

The preliminary assumption was that innovation stakeholders are not always aware of the existing networks, the nature of their activities, ways to get involved, and support they offer. On the other hand, the networks fail to deliver the services which would bring value to these actors. To perform the analysis INNO-MOB has developed an adaptation of Conceptual Model of Service Quality (as a customer satisfaction-oriented approach. Parasuraman et al., (1988) as described in the section 6.2. above.

The analysis focused on the identification of 5 gaps between the customer (SME) expectations, needs and experiences and the portfolio of services available, perception of the SMEs' needs by the ecosystem stakeholders:

- 1 a) The mismatch between the service portfolio expected by SMEs and offered within ecosystem,
- 1 b) Misunderstandings between the perception of SMEs needs by the stakeholders and assessment of SMEs ,
- Ability of the ecosystem to react to the changing needs of SMEs,
- Means to reach SMEs with communication about the service,
- Mismatch between the factors contributing to SMEs satisfaction/dissatisfaction in the service use experience and perceived quality factors constituting the value of the provided services.

The results of the analysis are presented below.

9.1 Gap 1 Mismatch between the service portfolio expected by SMEs and offered within ecosystem

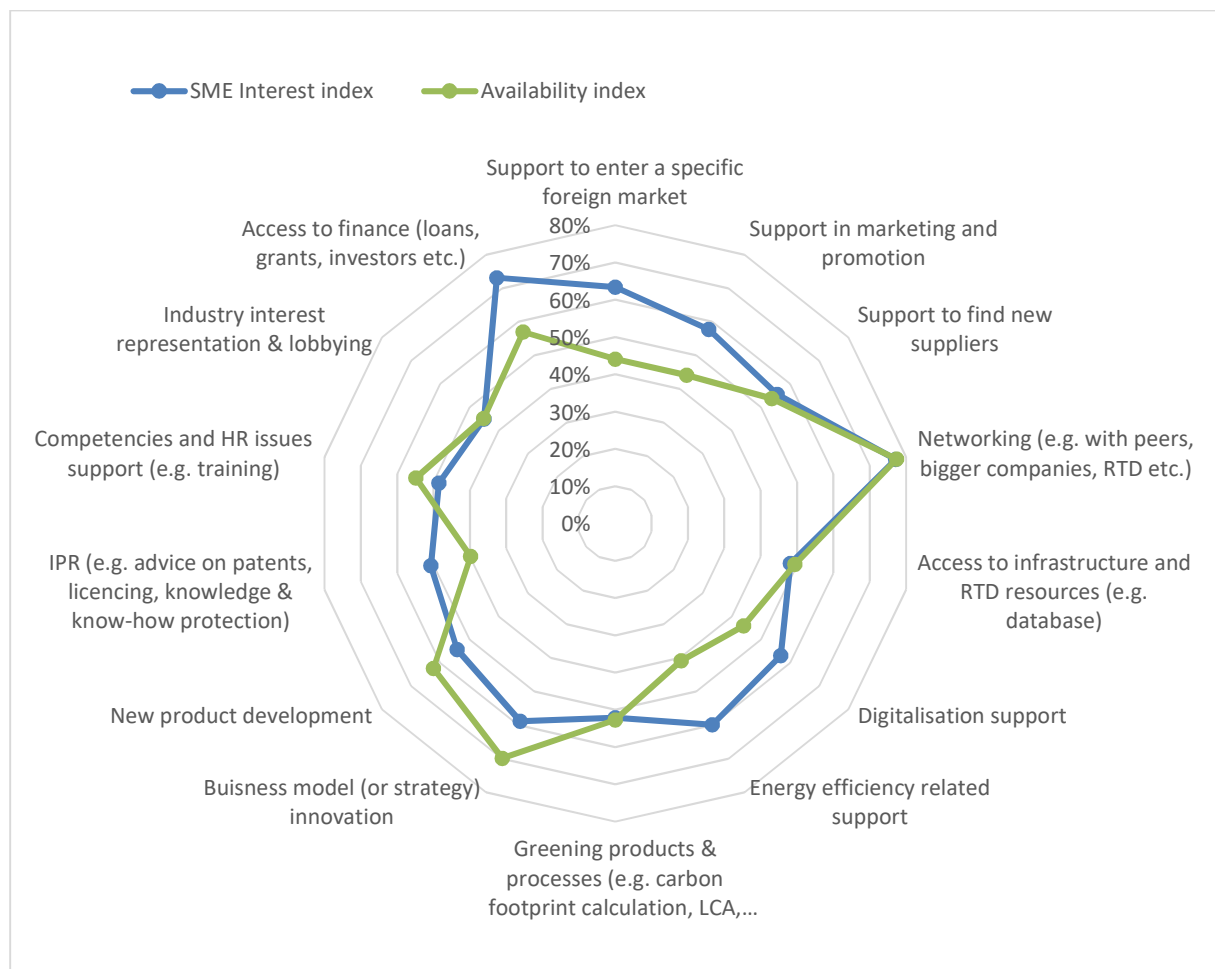
The first gap refers to the service portfolio offered by the support ecosystem stakeholders and the interest of the mobility sector SMEs. In both research exercises: SME survey and IDIs among the support providers a harmonized list of service categories was provided, based on literature and the nomenclature used in the countries represented by the project partnership. The SMEs were asked to declare their interest to use the service category on the list in the next 12 months while the service providers were asked to declare the availability of each service category within th support portfolio of their organisations.

For the needs of the comparison two simple indices were calculated for each service:

- SME interest index, calculated as a percentage of the number of answers: “I am interested in using such a service in next 12 months”, and half of the number of answers: “I would need more information to decide, if I am interested in using such a service in next 12 months” among the total number of respondents the SME survey.
- Availability index, calculated as a percentage of the number of declarations of the availability of the service category within the examined organisation’s portfolio among the number of respondents of IDIs.

The results of the comparison are presented on the graph below.

Figure 22 Support services: interest & availability gap



As the above described indices are not precisely reflecting the size of the demand of supply in terms of size of the service market the comparison of the indices was complemented by a rank of SME interest and of the availability based on the same results (percentage of answers per category of service in both research exercises). The ranking is presented in the table below.

SME rank	Service	Availability rank
1	Networking (e.g. with peers, bigger companies, RTD etc.)	1
2	Access to finance (loans, grants, investors etc.)	4
3	Support to enter a specific foreign market	10
4	Energy efficiency related support	13
5	Buisness model (or strategy) innovation	2
6	Support in marketing and promotion	11
7	Digitalisation support	12
8	Support to find new suppliers	6
9	New product development	3
10	Greening products & processes	7
11	IPR advice	14
12	Competencies and HR issues support (e.g. training)	5
13	Access to infrastructure and RTD resources (e.g. database)	8
14	Industry interest representation & lobbying	9

Table 16 Categories of support services ranked by the interest of SMEs and avaiability in the portfolio of providers

Both comparisons show that the most important gaps of missing services are related to:

- **Energy efficiency related support.** For this service category the interest index is higher of 19 percentage points than the availability index, also for this category the biggest difference is in the ranking sequence: it is no. 4 according to SMEs interest and no. 13 as for occurance on the suppliers' offer;
- **Support to enter a specific foreign market,** for which the index difference is also 19 points, but comes second on the rankings' positions: it appears on the third position in the SMEs' interest ranking but on the tenth of availability ranking;
- **Support in marketing and promotion,** with 14 points of disparity as for the interest and availability indices and also discrepancy between high position on the SME interest ranking (third) but low on the popularity list among suppliers (tenth);
- **Digitalisation support,** with 13 points of difference in indices and considerable position difference on the ranking lists: 7th on the demand side and 12th on the supply side.
- **Access to finance** (loans, grants, investors etc.), for which the interest is 16 points higher than the availability, however the position on the ranking lists is high on both sides: demand (second) and supply (fourth).

IPR support (e.g. advice on patents, licencing, knowledge & know-how protection), for which 11% more SMEs are interested than organisations offering the support. Hower this category support is ranked low by SMEs (11th position) and requires high level of expertise by the support providers. This means that the simple calculation of percentage of SMEs interested

and supply providers may be not robust enough metrics. Still it is worth consideration to increase basic advice competencies on the supply side so that first level advice is more available to prepare for the specialised advice. For example “freedom to operate” advice does not require high level specialisation and experience and might be needed to more companies than the advice on the IPR protection strategy of the higher level, not to mention the conflicts resolution related to IPR issues.

9.2 Gap 2 Misunderstandings between the perception of SMEs needs by the stakeholders and assessment of SMEs

To identify the needs of the SMEs two different questions were asked in the survey:

- About the strategies: *Have you over the last three years developed one or more of the following activities?*
With a list of strategic activities and cafeteria of answers: *yes; no; thought about it, but did not go ahead; plan to do it in the next 12 months;*
- About the challenges: *Are any of the below issues regarding sustainability a major challenge for your organisation?* With a list of challenges and cafeteria of answers: *We see significant challenge; We see some challenges; We do not see any challenges, We see them as an opportunity; I don't know/ I do not have an opinion.*

Whereas the support ecosystem stakeholders were given an open question in IDI scenario within the *Target group* section. Following the question: *Describe your target group (customers)* the respondents were asked: *What are their needs?*. The majority of respondents used the language of support services to define the needs of SMEs, some tried to use more general diagnostic approach as for the challenges SMEs face. The research team coded the answers using both service categories as above and the challenges from the SMEs survey. The result did not return comparable information to the survey results. Therefore the authors translated the language of challenges and strategic responses by companies to make a list of needs comparable to the support stakeholders answers. Then the significance of challenges from the Likert's scale was applied and similar assessment of the stakeholders perception was attributed by the frequency of mentions of a given category and the analysis of citations. This analysis has shown that the mobility sector support stakeholders, i.e. those whose target group is operating in the sector are able to recognise the specific issues related to the EU climate policy and the regulations. Therefore the issues identified by the sectoral stakeholders were assessed as higher on the significance scale: 0=not an issue, 5=critical issue/need. The result of the comparison is shown on the graph below.

Figure 23 SME needs perception gap



The comparison of the significance by the SMEs and the support stakeholders reveals that both sides consider **new product development AND its introduction on the market** as most important.

The biggest gap between the perception of SMEs needs by the stakeholders and assessment of SMEs is related to **price competition** and **cost optimisation**, which is an important need expressed by the SMEs and underestimated by the support ecosystem.

9.3 Gap 3 Ability of the ecosystem to react to the changing needs of SMEs

The degree of flexibility seems to be high as 37 stakeholders declare they are always adapting to the SMEs' needs and have no procedural constraints in doing so, whereas 12 stakeholders declare they have a continuous process of discussions with the partners and internally the observations of the market trends and SMEs feedback. 19 stakeholders declare they have some restrictions to the adaptation of the services, mostly related to the legal requirements or the rules of the projects, within which the services are provided. However none of them sees such restriction as a blocking factor to adapt to the changing needs.

More in depth analysis of the statements about the ability of the ecosystem to react to the changing needs of SMEs allows to consider it as rather **shallow and declarative**, without concrete statements about the adaptations to support them. In this point it is important to note that the ecosystems are not always equipped to quickly adapt to the changing needs of the SMEs. The adaptation is mostly with the individual approach to each client: [*We can adapt to every customer need*]. For some stakeholders, the flexibility consists in the themes

of the events: workshops or training for the client. It does not include individual support for SMEs in reaction to the new need identified.

Only one stakeholder declared the development of a new service based on the client feedback: *[During the last year we have developed an additional service in response to the customers' needs and the market]*. 5 stakeholders have specific procedures for reflecting on the customer needs and introducing changes: *[we analyse the requests we receive at regular intervals and adapt our services according to the university's policy]*; *[We ask companies which trainings they want. We provide a list of 10 areas and then determine the top three topics based on the highest number of votes]*.

9.4 Gap 4 Means to reach SMEs with communication about the service

The analysis of the IDI results concerning communication is not highly conclusive. Taking into account the scarce presence of mentions of use of networks as means to reach out to SMEs and low level of reflection on the communication this aspect should be treated as a **sphere to improve**.

9.5 Gap 5 Mismatch between the factors contributing to SMEs satisfaction/dissatisfaction in the service use experience and perceived quality factors constituting the value of the provided services

To discover the mismatch between the factors contributing to SMEs satisfaction or dissatisfaction in the service use experience and perceived quality factors constituting the value of the provided services the research team altered the original ServQual to the following:

- Empathy:
 - Convenient business hours
 - Focus on the client issue
- Outcome:
 - Usefulness of the outcome
 - Quality of the outcome
- Reliability
 - Professionalism of staff
 - Keeping promises
- Responsiveness:
 - Time of delivery
 - Flexibility to the customer limitations.

More details on the approach were given in the section 6.2.

The results of SMEs survey and IDI among support stakeholders were quantitative: the SME respondents were asked as for the experience with a cafeteria of services, their satisfaction or dissatisfaction with each, they have used and assess the reasons within the quality dimensions as above. Whereas the support ecosystem stakeholders were asked to assess comparable dimensions as constituting the main value of their services. For both sides an

average of the assessment of the factors was calculated within the scale from 0 to 5: 0=not important, 5=of highest importance. The comparison of the averages for the factors of satisfaction or dissatisfaction for SMEs and factors of the support service value as perceived by the support stakeholders is presented on the graph below.

Figure 24 Quality factors perception gap



The biggest gap as for factors of high importance for SMEs underestimated by the supply side is related to **the time of delivery of support service**. Therefore the support service stakeholders should focus the improvement effort on this factor.

For both groups the most important factors of the services are related to the outcome of the service. The first on the importance ranking is the **usefulness of the outcome** and the second is the **quality of the outcomes**. This conclusion supports the hypothesis that the innovation support services differ from generalised service sector market with the importance and at the same time uncertainty of SME approaching the service of whether the outcome will be useful for addressing the challenge they face or not.

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