

---

**DT.1.2.3. CERIS3 & DIH Policy Needs**

**Version 01.00.01**

**Assessment Report**

**02 2020**

---



## Index

<b>1. Introduction .....</b>	<b>2</b>
<b>1.1. Project Overview .....</b>	<b>2</b>
<b>1.2. Scope of the document and summary.....</b>	<b>2</b>
<b>1.3. Audience.....</b>	<b>2</b>
<b>1.4. Change control procedure &amp; structure .....</b>	<b>2</b>
<b>2. Overview: policy makers, iRIS3 and digitization strategies .....</b>	<b>4</b>
<b>2.1. Interviewed policy makers .....</b>	<b>4</b>
<b>2.2. State of the art of S3 strategies and docking point with S3HubsinCE.....</b>	<b>5</b>
<b>2.3. Digitalization strategies.....</b>	<b>7</b>
<b>2.3.1. Contact Points.....</b>	<b>7</b>
<b>2.3.2. Most relevant measures to support digitalization .....</b>	<b>8</b>
<b>2.3.3. Long term strategies supporting digitization.....</b>	<b>9</b>
<b>3. Connecting Navigation Crews with running initiatives .....</b>	<b>10</b>
<b>3.1.1. Establishing connections with other regional policy making players ....</b>	<b>11</b>
<b>3.1.2. Create connections with future initiatives .....</b>	<b>12</b>
<b>4. DIHs: awareness level and available services .....</b>	<b>14</b>
<b>4.1.1. Known Services .....</b>	<b>14</b>
<b>5. Conclusions .....</b>	<b>16</b>
<b>5.1. Main evidences .....</b>	<b>16</b>
<b>5.2. Policy needs.....</b>	<b>17</b>
<b>6. Annex .....</b>	<b>18</b>



## 1. Introduction

### 1.1. Project Overview

S3HubsinCE aims to utilise the model of the digital innovation hub, and linkages between these hubs created through collaborative exchange on smart specialisation thematic priority areas, to create a common transnational support structure. This structure has a goal to generate stronger connections between RIS3 stakeholders to promote value creation and enhanced competitive advantage in Central Europe.

Ultimately it creates and tests a common method to help regional and national strategy-responsible institutions understand how RIS3 value-creation can be fostered through a connected network of Digital Innovation Hubs. The project focuses on:

- Transnational innovation network to enhance collaborative RIS3 exchange and identify RIS3 Champions
- DIH alignment through a common pilot-program, to promote market-focused RIS3 Excellence and RIS3 Value- Creation
- Future-orientated policy learning with closer-to-market activities.

### 1.2. Scope of the document and summary

The document provides a summary of the main evidences of the policy needs assessment. It identifies the major needs referred to digitalisation in our project partner regions. The policy needs assessment has been done via face-to-face interviews with various stakeholders in the program area.

### 1.3. Audience

This document is directed at all project partners (full and associated). The document should be used also by Crew Members as a relevant input for their Strategies and Action Plans (T2).

### 1.4. Change control procedure & structure

The Deliverable Responsible, ECIPA, created this guidance document, and it is under standard project change control, whereby Partners are requested to give feedback on the stated definition or tools in writing to the Deliverable Responsible in a timely manner (within 10 days of document circulation).



As per normal procedure, at any time partners believe a deliverable should change, the request should be brought to ECIPA (Deliverable Responsible lead) and IMECH (Work Package Leader), to consolidate feedback from other partners, and integrate and disseminate the final agreed changes.



## 2. Overview: policy makers, iRIS3 and digitization strategies

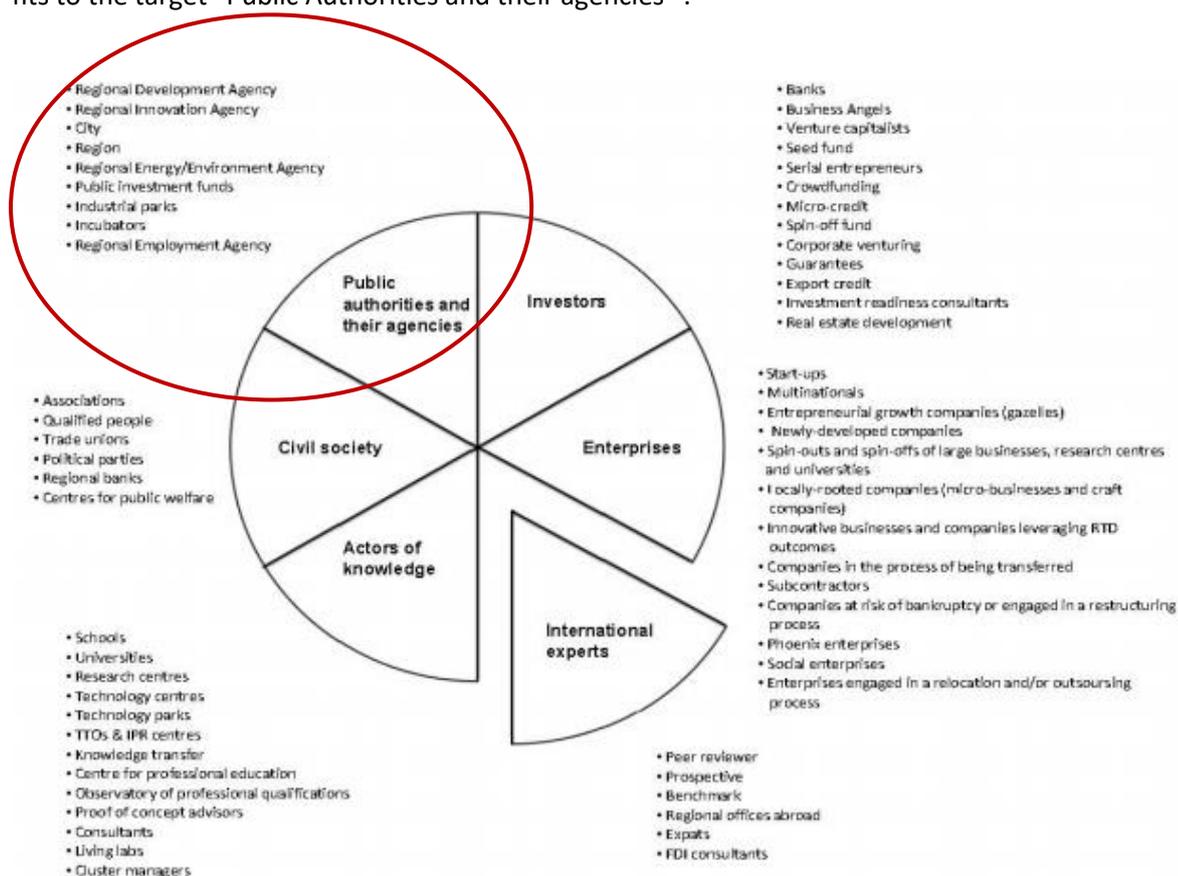
### 2.1. Interviewed policy makers



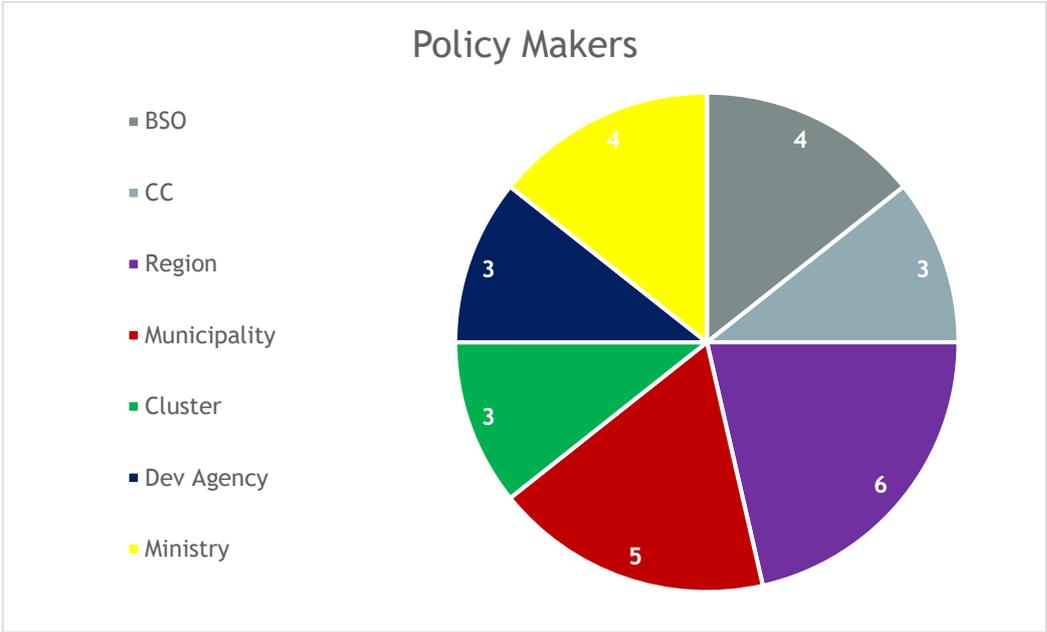
Policy actors that have been involved in the assessment interview include a wide range of typologies with different roles and influencing capacity.

They represent all those actors that are either involved in designing, reviewing or implementing S3 strategies. If we consider the classification provided by the European Association of Development

Agencies to identify the most relevant actors that should be included in designing, implementing and monitoring RIS3 strategies, we will see that our selection (28 actors have been interviewed) perfectly fits to the target “Public Authorities and their agencies” .

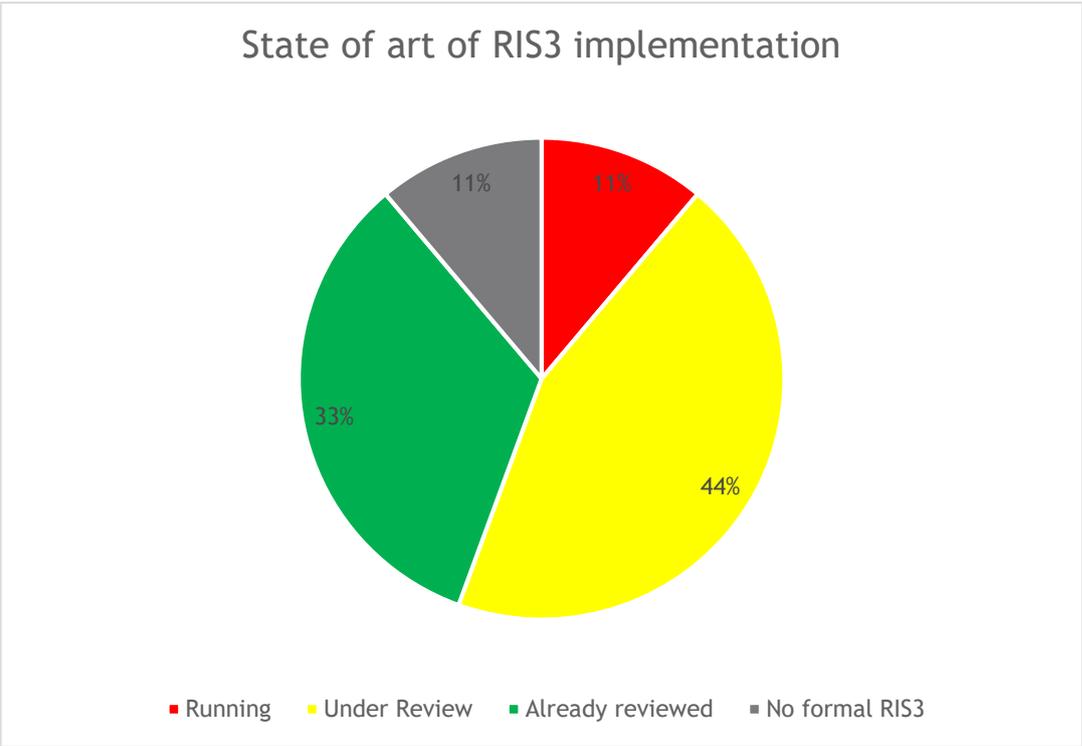


The graph below provides the overview of interviewed players. Regional Authorities, Ministries, Municipalities and Business support Organizations are the most represented.



## 2.2. State of the art of S3 strategies and docking point with S3HubsinCE

The first part of the interview aimed at providing a general picture of the state of the art of Smart Specialization Strategies in the involved regions / countries.





There is a relevant amount of RIS3 strategies which is currently under review and, as we will see later on, this may be seen as a concrete opportunity for project partners to contribute to the review process.

The most relevant key messages that should be considered when designing the further steps of the S3HubsinCE project may be summarized as follows:

- Smart industry and digitalization are among the top priorities in all involved regions and they are mentioned also when describing how transports or agriculture should be transformed over the next years
- Dedicated thematic working groups have been set up and should be included in our stakeholders list: Crew Leaders may consider the opportunity of identifying thematic synergies with them
- The translation of “innovation-oriented strategies” into concrete operational guidelines is still missing in several RIS3 (and/or sometimes a mismatch between strategy and actions can be observed): the project could therefore be a way to provide concrete measures to achieve it
- Digital Innovation Hubs are sometimes mentioned but still the connection between them and RIS3 is not clear: again, the project may help to connect these 2 entities and provide concrete demonstrators to policy-makers
- There are several other tools (clusters, regional innovation networks, open innovation platforms, data aggregators, etc.) which have been put in place to support, implement or monitor these strategies which should be considered during the implementation of S3HubsinCE

- Last but not least, it would be relevant if the project may help to observe how RIS3 strategies have been implemented so far in Europe and which are the key messages which will be incorporated in reviewed

## Monitoring

### Massive Open Online course on Monitoring Smart Specialisation

The JRC has identified the key aims and characteristics of monitoring S3 and consolidated such knowledge into a free MOOC (Massive Open Online Course).



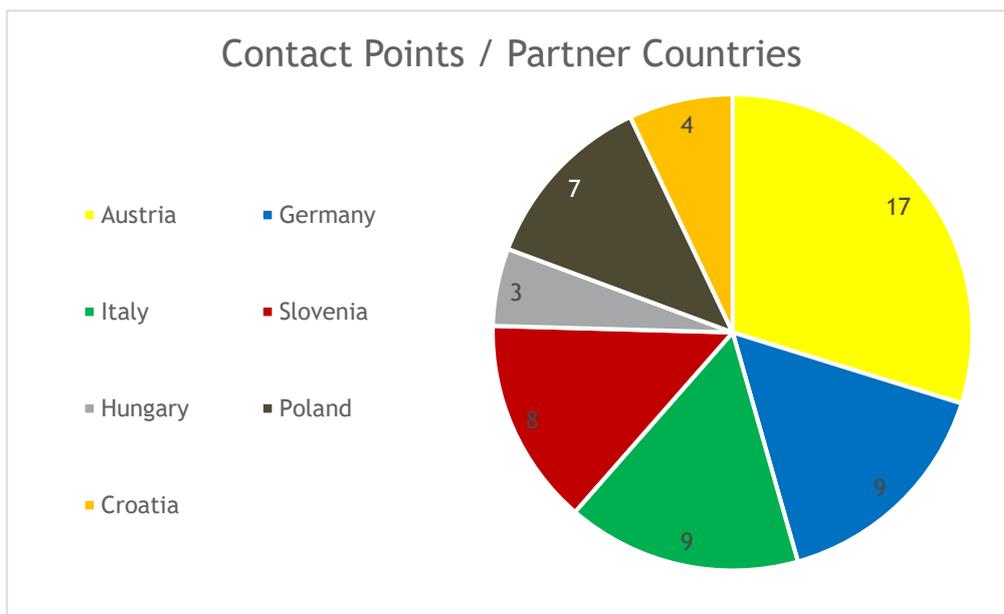


versions: under this perspective we would like to evidence that a Report in 2018<sup>1</sup> has already been published and that dedicated initiatives<sup>2</sup> have been put in place by the Commission.

## 2.3. Digitalization strategies

### 2.3.1. Contact Points

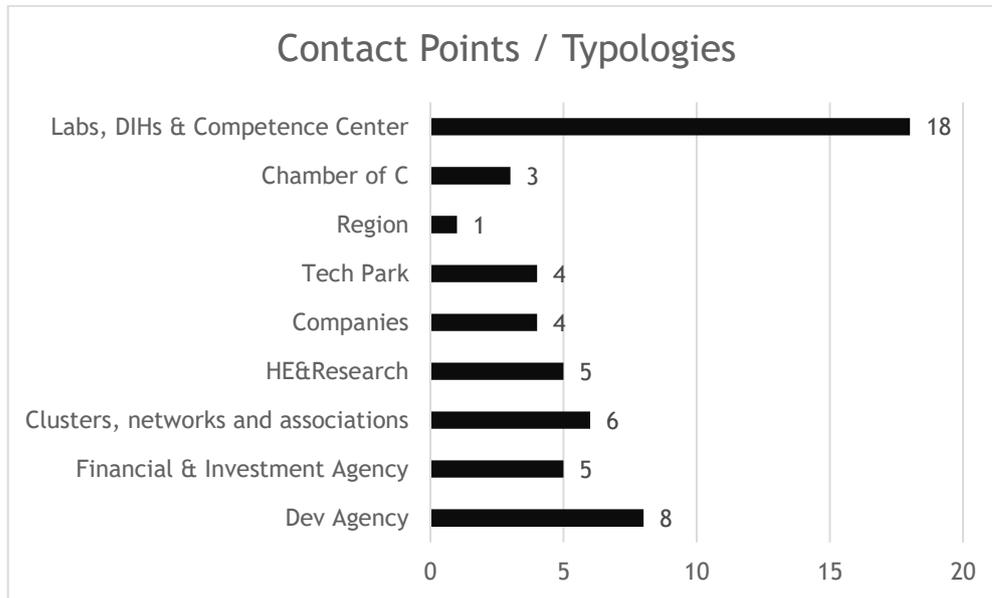
Most of the current available contact points are based in Austria. This is also due to the fact that several enterprises have been counted among these players while in other countries, like Italy for instance, the separate entities which are in charge of digitalization strategies have not been counted separately (see Annex 6.1). These actors should be carefully considered by project partners (and navigation crews) when it will come to design concrete actions because they can be considered as the main “digital” influencers at regional level and good partners to design new and effective services.



What is also interesting is to observe which kind of contact points have been suggested: 18 of them represent thematic digital labs, Digital Innovation Hubs and official Competence Centres which makes them ideal stakeholders to be considered when planning further actions during the implementation of the project.

<sup>1</sup> [https://sustainable.unimelb.edu.au/\\_data/assets/pdf\\_file/0006/2792319/State-of-the-Art-Review-of-Smart-Specialisation-in-Europe.pdf](https://sustainable.unimelb.edu.au/_data/assets/pdf_file/0006/2792319/State-of-the-Art-Review-of-Smart-Specialisation-in-Europe.pdf)

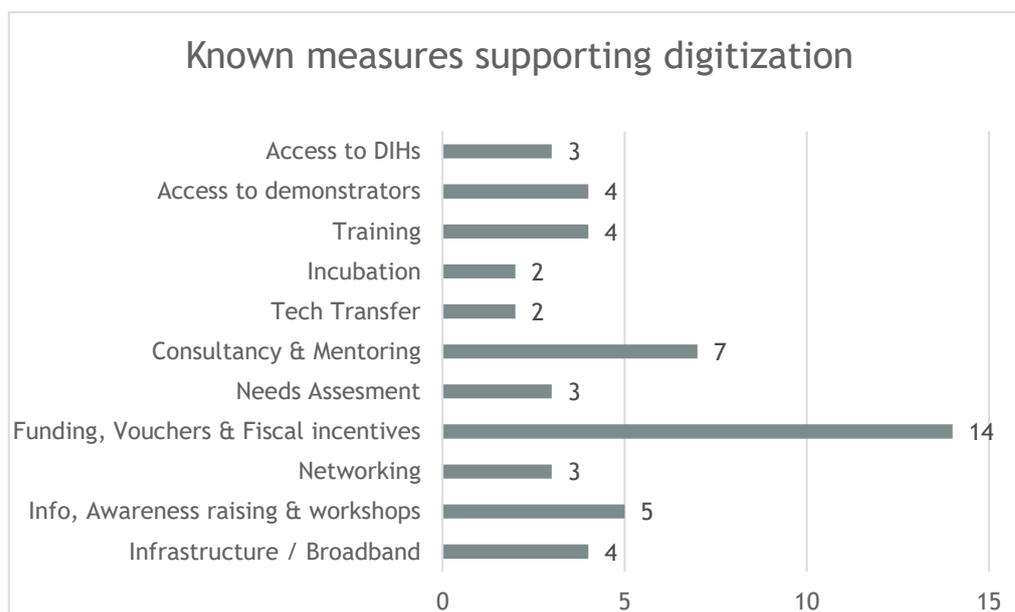
<sup>2</sup> <https://s3platform.irc.ec.europa.eu/monitoring>



### 2.3.2. Most relevant measures to support digitalization

Financial support, under the form of grants, fiscal incentives or vouchers are still the mostly widespread measures supporting SMEs' digitalization.

Consulting and mentoring are in second place. Interviewed policy makers evidence that – where relevant – access to Digital Innovation Hubs or to real technology demonstrator sites could be even more effective for enterprises. This is due to the fact that these “sites” can show how technology works, can explain the benefits and accelerate the overall understanding of a specific domain.

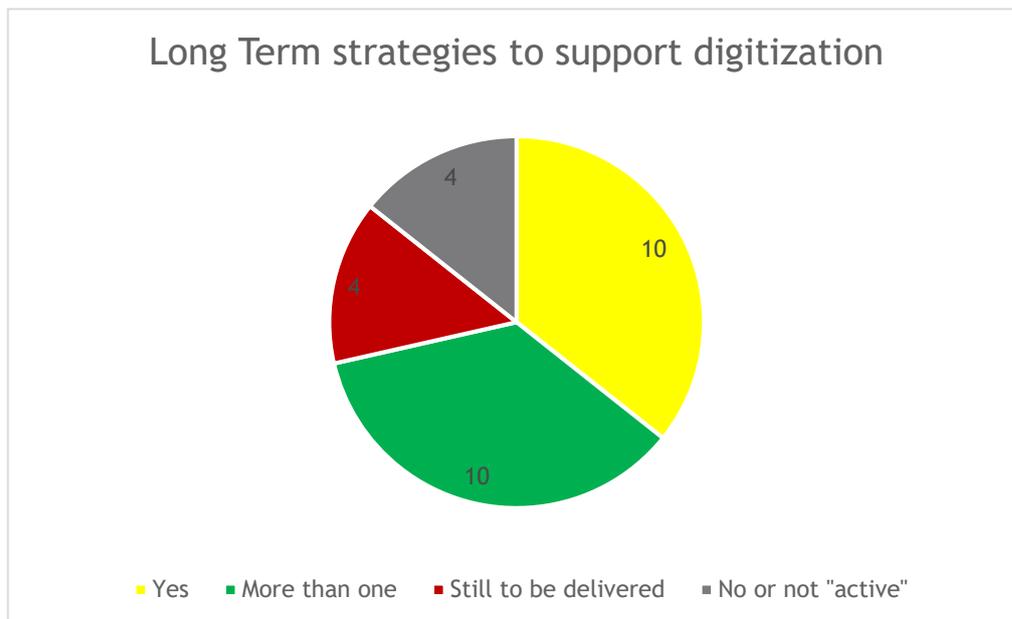




### 2.3.3. Long term strategies supporting digitization

Long term strategies have been put in place to support digitalization. Policy makers have evidenced that in several cases there are more than one for different purposes (like a “smart industry” chapter under the RIS3 strategy and a digital agenda as a separate strategy) or to cover different geographical areas (regional or national).

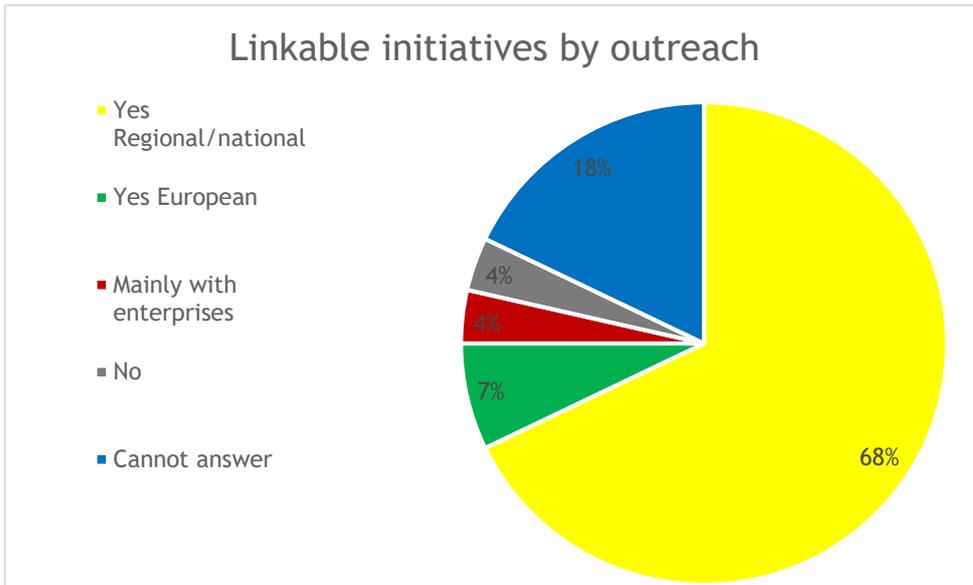
All regional authorities have asked to be informed about the state of the art of the S3HubsinCE project and, possibly, to be involved where relevant (i.e.: to discuss results, to share policies implemented in other regions, to visit DIHs in other areas and have the opportunity to talk to relevant RIS3 actors of other regions).



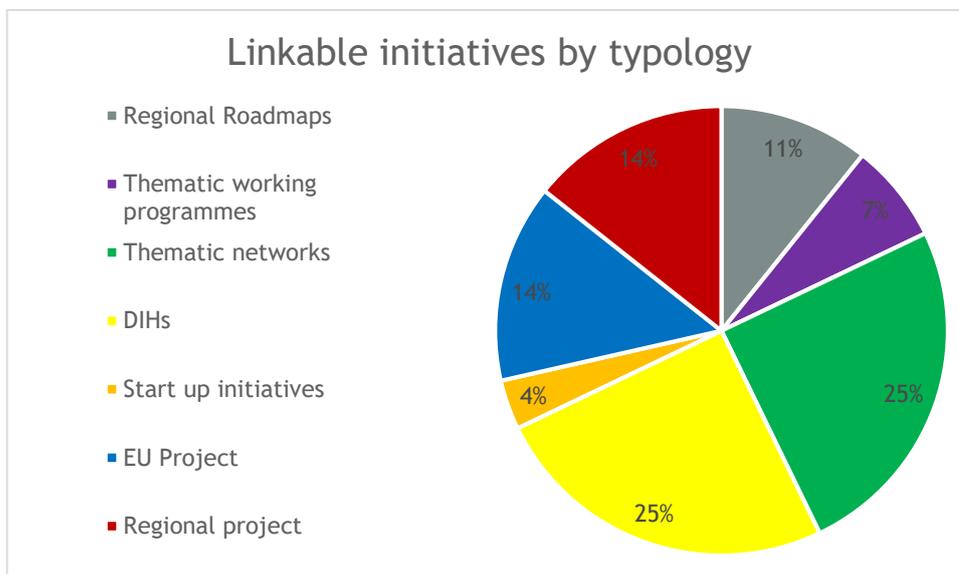


### 3. Connecting Navigation Crews with running initiatives

Policy makers have a global overview of running initiatives at regional and national level. Based on the technology priority areas of each Crew, they have been asked to provide a list of running initiatives that should be considered by the crews when they will work on strategies and action plans.



25% of the initiatives refer either to Digital Innovation Hubs or to thematic regional innovation networks which have been formally established to coordinate, finance and/or implement thematic projects at regional level. An alignment of these initiatives to the action plans of Navigation Crews and – generally speaking – the S3HubsinCE project is desirable.



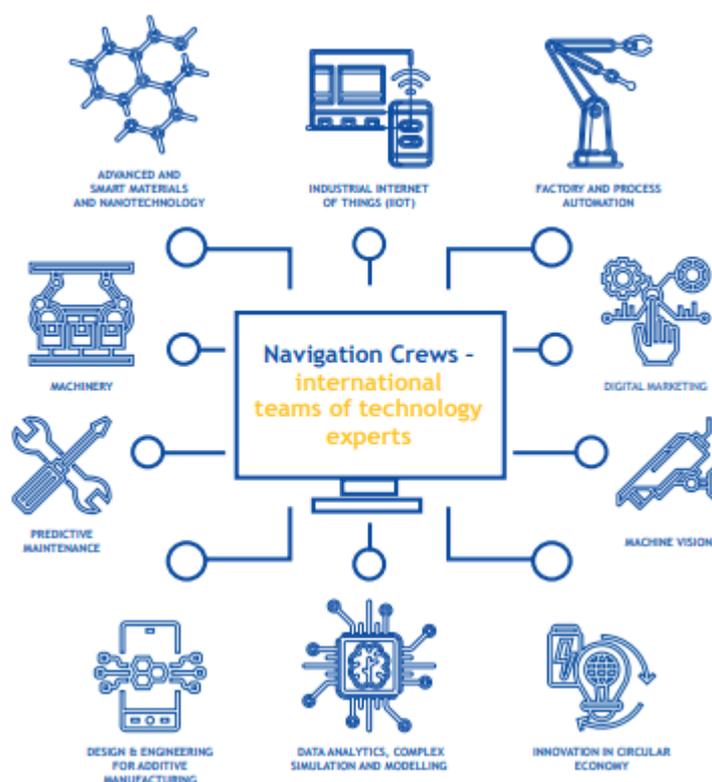


### 3.1.1. Establishing connections with other regional policy making players

All interviewed policy makers have declared their interest in getting in touch with other policy makers of other regions and countries.

While 8 did not mention any specific topic which may be the base for discussion or exchanges with other policy makers, the list of the topics provided by the rest of the interviewees is interesting and should be analysed by each Navigation Crew to further exploit transnational cooperation:

- Digitalization
- Digital Economy
- Tourism & Sustainable Tourism
- Innovation
- Advanced Manufacturing
- Artificial Intelligence
- Circular Economy
- Additive Manufacturing
- Smart Cities
- Life Science
- Bioeconomy
- Cybersecurity
- Entrepreneurship
- Internationalization
- Value chains
- Robotics
- Photonics
- Factories of the future
- Digitalization mechanisms for SMEs, as well as joint platforms
- E-public administration



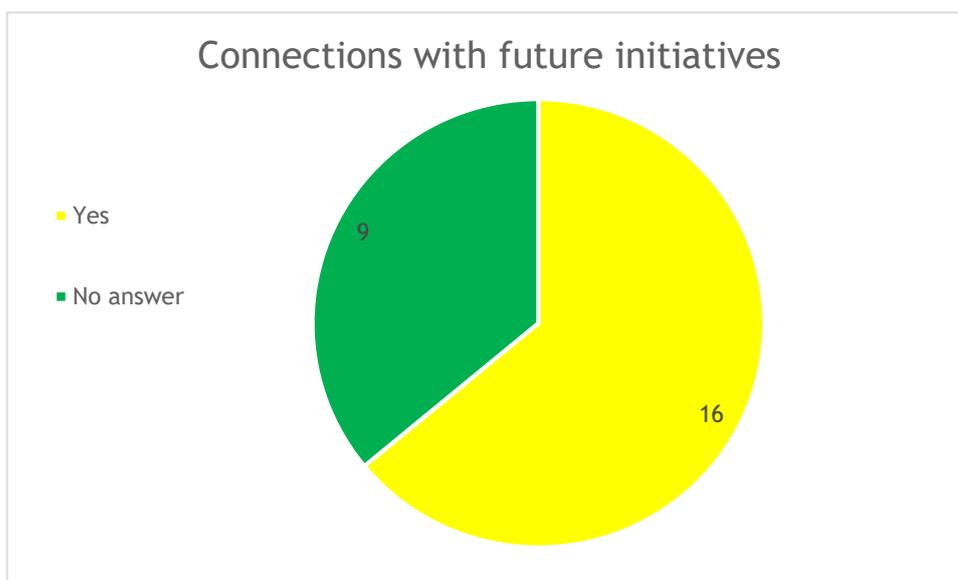
**Check Thematic Synergies**



- ICT infrastructure
- Digitalisation of the public transport

### 3.1.2. Create connections with future initiatives

Most of the interviewee declared concrete interest in connecting future initiatives to S3HubsinCE and its Navigation Crews. Apparently negative answers are mainly due to the fact that there was no clear picture about future action by the time when the interview was done.



The most relevant domains or future initiatives that may be linked to S3HubsinCE are:

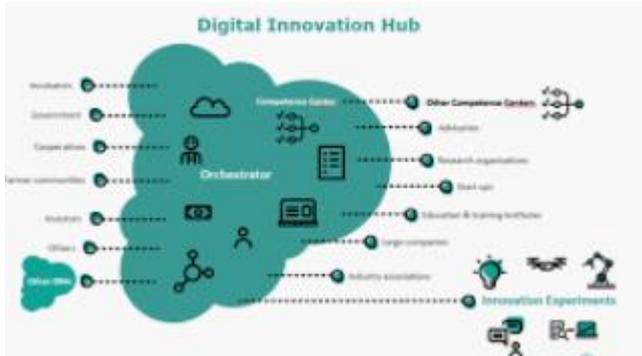
- Initiative promoted by the Federal Ministry of Transport
- Platform Industrie 4.0
- Agency for Digitalization / Digitalisierungsagentur
- Connect chambers of commerce into thematic regional networks
- Innovation focused initiatives but coordinated at centralized level
- Connect DIHs
- Connect members' activities with complementary ones in CE
- Structured / formal running projects where available
- Connect RIS3 managers in a more structured way
- Ask funding authorities to launch dedicated calls to connect initiatives at EU level



- 
- Internationalization oriented initiatives
  - Skills building
  - Connecting entrepreneurs of the technology sectors
  - Smart Cities



## 4. DIHs: awareness level and available services



Almost everyone, with the exception of 2 stakeholders, is aware about DIHs, their role and which services they deliver.

In some cases, stakeholders have been directly involved in applying to formal calls to establish a regional or thematic Digital Innovation Hub.

### 4.1.1. Known Services

A set of services were introduced to each interviewee to check whether they know them. They have been described to stakeholders as follows:

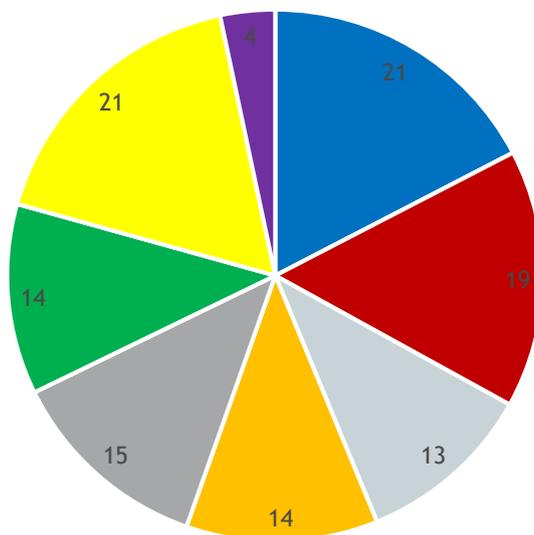
- Awareness: Roadshow, Factory tour, Videos of best practices, spreading information
- Diagnosis: Online maturity diagnosis, consultancy, benchmarking
- Transformation plan: In-depth audit, definition of a transformation plan
- Realisation: Transformation plan (Specialised activities, strategic support, technological support), Training (Industry 4.0 training)
- Growth: Internationalisation, Promotion of Champions, Increased visibility
- Financing: Vouchers Industry 4.0 and digital transformation, Digital Hub
- Innovation: Demonstrators, Startups booster, Specialised workshops, living labs, creative hubs, Fablabs, Roadshow best practice

There is a good general understanding of the service categories delivered by the Hubs. An area where there is still a gap to be minded is the access of SMEs to these Hubs: in other terms, SMEs still do not fully understand how they can benefit from DIHs and how they are different from the consulting services provided by traditional “private” consultants.



### Known Services provided by DIHs

- Awareness
- Diagnosis
- Transformation plan
- Realisation
- Growth
- Financing
- Innovation
- Other





## 5. Conclusions

### 5.1. Main evidences

The Policy Assessment report provides a summary of the main evidences of the policy needs assessment. It aims at identifying the major needs referred to digitalisation in our project partner regions.

Policy actors that have been involved in the assessment interview include a wide range of typologies with different roles and influencing capacity thus helping project partners to achieve a first relevant goal: to connect with relevant policy makers that should be included in the strategic and action planning process foreseen by the project.

#### **RIS3**

RIS3 strategies are in place almost everywhere and, which matters even more, there is a relevant amount of RIS3 strategies which is currently under review: stakeholders suggested to see this as a concrete opportunity for the project to contribute to the review process

#### **DIGITALIZATION**

A quite long list of key-players supporting digitalization strategies has been provided. These actors should be carefully considered by project partners (and navigation crews) when it will come to design concrete actions because they can be considered as the main “digital” influencers at regional level and good partners to design new and effective services.

#### **MEASURES TO SUPPORT DIGITALIZATION**

Even in this case, many support measures are known. Interviewed policy makers evidences that – where relevant – access to Digital Innovation Hubs or to real technology demonstrator sites could be even more effective for enterprises. The project should help to make a wider use of these “structures” to demonstrate the benefits of digitization to SMEs.

#### **CONNECTION CREWS / INITIATIVES**

The possible connections that may be generated by the project between Navigation Crews and running initiatives at regional, national or even EU level are many. 25% of the initiatives refer either to Digital Innovation Hubs or to thematic regional innovation networks which have been formally



established to coordinate, finance and/or implement thematic projects at regional level. An alignment of these initiatives to the action plans of Navigation Crews and – generally speaking – the S3HubsinCE project is desirable.

All interviewed policy makers have declared their interest in getting in touch with other policy makers of other regions and countries.

#### **AWARENESS LEVEL DIH**

Last but not least, the interviews provided evidence about the general high level of awareness and understanding of what DIHs are and which services they can provide. Still SMEs do not fully understand how they can benefit from DIHs and how they are different from the consulting services provided by traditional “private” consultants.

## **5.2. Policy needs**

Based on the answers provided and further discussions with interviewers and stakeholders, the major needs that could be addressed by the S3HubsinCE project may be summarized as follows:

- Facilitate connections among RIS3 actors to increase the general understanding of how strategies are working (or not) to support digitization of SMEs
- Introduce, where relevant and possible, concrete feedbacks from Navigation Crews as additional inputs to be considered during the RIS3 strategy review process
- Help to harmonize the different activities of the several players involved in offering digitization support, at least at regional level: the project and the connections with the DIHs may contribute to achieve this goal
- Increase cooperation between DIHs and SMEs, by also increasing the amount and quality of available demonstrators (this may be further achieved by connecting DIHs)



## 6. Annex

### 6.1. List of contact points

#### AUSTRIA

- BABEG - Kärntner Betriebsansiedlungs- und Beteiligungsgesellschaft m.b.H.
- Kärntner Wirtschaftsförderungs Fond (KWF)
- Industriellenvereinigung Kärnten (IV)
- Wirtschaftsförderungsinstitut (WIFI)
- Educational and Research Organisations (e.g. university)
- Atos Origin
- IBM
- FH Kärnten
- University of Klagenfurt
- Lakeside Park Klagenfurt
- Infineon
- Bildungsdirektion
- Chamber of Commerce Burgenland
- Digitization Agency
- Wirtschaft Burgenland
- Regionalmanagement Burgenland (RMB)

#### GERMANY

- Industriellenverein
- Virtual Dimension Center (VDC);
- Stuttgart Region Economic Development Corporation (WRS);
- Application Center Industry4.0 (Fraunhofer IPA);
- Center for Digitalization Böblingen (2D BB);
- SME 4.0 Competence Center Stuttgart (Mittelstand 4.0. Kompetenzzentrum, IPA);



- Alliance Industry 4.0 (State Agency)
- Digital Hub Nordschwarzwald,
- Campus Schwarzwald
- Digital Hub Nagold, IHK, WFG, business developers, ministries, founders

#### ITALY

- DIH Lombardy
- MADE Competence Center
- AFIL
- IP4FVG
- Regional Innovative Networks (Reti Innovative Regionali – RIR)
- Competence Center (SMACT)
- PIDs
- Digital Innovation Hubs
- SAD - Digital Aggregator Subjects for Public Administrations

#### POLAND

- Małopolska Information Society Council
- General Department of the Office of the Marshal of the Małopolska Region
- Sustainable Development Department of the Office of the Marshal of the Małopolska Region
- Department for Managing Operational Programmes
- Cyfronet AGH
- the Kraków Technology Park (KTP)
- The Digitalisation Unit in the Office of the Marshal

#### SLOVENIA

- Horizontal network ICT
- relevant Universities and Faculties
- Slovene Enterprise Fund



- Public Agency SPIRI,
- SID Bank-providing financial instruments
- Universities
- National DIH

#### HUNGARY

- AM Lab (PBN)

#### CROATIA

- Varaždin Technology Park;
- Entrepreneurial incubator Lucera Ludbreg
- Technology and Innovation Center Medjmurje
- The Development and Educational Centre for the Metal Industry – Metal Centre Cakovec



## 6.2. List of relevant initiatives that could be connected with Navigation Crews

- Digital Roadmap
- Lieferantenentwicklungsprogramm des Kärntner Wirtschaftsförderungs Fond (KWF)
- Industry 4.0 Platform
- Kärnten Digital
- DIA
- Haus der Digitalisierung
- DIH-Ost
- SME Digital
- Start Up Incubator
- Digital Hub and Innovation Management by the WFG
- Digital Hub Nordschwarzwald
- Center for Digitalization Böblingen (2D.BB),
- 4 STEPS (Interreg CE Project),
- Application Center Industry 4.0
- Bergamo Tecnologica
- Vanguard Initiative
- ADMA
- Fari Manifatturieri
- RIR – Regional Innovation Networks
- Regional Digital Agenda
- Skills plus Interreg project
- Demopiloti
- DIHSlovenia
- Go Stop



- Development and Educational Centre for the Metal Industry – Metal Centre Cakovec