



**ADVANCED MANUFACTURING AND
ADVANCED TEXTILE MATERIALS GOING
INTERNATIONAL TO STRENGTHEN
RESILIENCE AND TO EMPOWER
INDUSTRIAL RECOVERY**

Grant Agreement number: 101035895

**D2.7 - Report on follow-up activities, MoU signed,
cooperation projects and global assessment of the
three missions**

Lead partner: PRODUTECH



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EXECUTIVE SUMMARY

This document consists of Deliverable 2.7 – “Report on follow-up activities, MoU signed, cooperation projects and global assessment of the three missions” and was developed in the scope of *Task 2.3 – Mission evaluation and follow-up*, of the European project "ADMANTEX2i – Advanced Manufacturing and Advanced Textile Materials Going International to Strengthen Resilience and to Empower Industrial Recovery". This project was funded by the European Union's COSME Programme under grant agreement No 101035895.

This deliverable describes how the activities implemented in the scope of *Task 2.2 – Testing action in 3 exploratory and learning business missions* respond to the objectives defined for WP2 – Strategy development towards an implementation roadmap, which aim at: (i) implementing the internationalization strategy and roadmap with the goal of establishing long-lasting cooperation agreements and facilitating business cooperation agreements; (ii) facilitating the positioning of European SMEs at the forefront of global value chains to create growth opportunities for companies and cooperation opportunities for the partnership clusters; (iii) fostering recovery and strengthening resilience in the advanced textile materials and advanced manufacturing sectors, hence fostering cross-border and cross-sectoral cooperation.

In this scope, a set of actions were developed by the Project Partners (PPs) in order to assess the effectiveness and impact of the three international missions and identify, together with the participating companies and RTOs, the planned / executed follow-up activities, potential for / concrete cooperation projects to be developed, business agreements signed / to be signed and MoU signed with local stakeholders in each country. For these purposes, a dedicated survey for each of the three missions was developed and interviews with the participants were conducted to gather relevant inputs and insights.

KEYWORDS: CLUSTERS; SMEs; STAKEHOLDERS; INTERNATIONALIZATION; BARRIERS; OPPORTUNITIES; CHALLENGES; BEST PRACTICES; COOPERATION; RESILIENCE; RECOVERY; ADVANCED TEXTILES; ADVANCED MANUFACTURING

1. ABOUT ADMANTEX2i

Industrial digitalization and the green transition are the two pillars of the European Commission for building resilience, as highlighted during the Cluster conference 2020 that builds on top of the new industrial strategy of the European Commission and the EU Green Deal as significant pillars. Furthermore, strengthening digital and green-based SMEs' competitiveness is also a core pillar from the Next Generation EU initiative for recovery.

The primary strategy adopted for this project aimed at bridging the gap between technology producers and end users to boost innovation and industrial modernization to catalyze sustainability and circular economy in the technical textile and advanced manufacturing industries.

The project enabled the alignment of each partner cluster strategy with the RIS3 priorities of each region and the uptake of digitalization and advanced production systems as a standard driver for growth via internationalization by exploiting innovation towards sustainability and circular economy. In addition, ADMANTEX2i aimed at providing tools and support to partner's members to be globally competitive for going international and organized three international missions to selected markets.

ADMANTEX2i also sought to favor the cross-regional value chains involved and foster cross-sectoral cooperation with specialized eco-systems across Europe, focusing on the industrial smart specialization priorities where all partners are already active. For example, AEI TÈXTILS, CITEVE, and ATEVAL are part of the REGIOTEX platform for textile innovation. Similarly, PRODUTECH, EMC2 and AFIL are members of the S3P-Industry platform within the areas of 3DP and ESM and the participation in the pilot actions under the Vanguard Initiative umbrella.

ADMANTEX2i aimed to continue driving the long-term cooperation strategy among the partners already seeded in CLAMTEX (ESCP4x) and GALACTICA (Innosup-01) projects. The continued fostering of cross-regional and cross-sectoral cooperation among all clusters provided their members the leverage needed to become globally competitive with digitalization uptake and focus on sustainability.

1.1 ADMANTEX2i OBJECTIVES

ADMANTEX2i's main objective is to lead international cluster cooperation in advanced manufacturing and advanced textile materials as an enabler for globally competitive sustainable products functional in a broad range of high-end applications. The key specific objectives are:

- To develop a joint internationalization strategy and a roadmap for going international based on the strategic cross-sectoral cooperation between clusters in advanced manufacturing and advanced textile materials which the EU is a strong leader.
- To implement the strategy organizing three international business missions.
- To foster the cross-sectoral cooperation.
- To strengthen the sectoral resilience and boost growth based on internationalization.

ADMANTEX2i strategic cooperation vision is that digitalization is a crucial enabler for both sectors to boost circular economy business solutions to strengthen resilience and drive the recovery growth of the economic opportunities of European SMEs. The Partnership comprises three advanced textile materials clusters and three advanced manufacturing clusters from six EU regions and four EU member states in southern Europe.

ADMANTEX2i focuses on three main pillars to build up internationalization opportunities: cooperation development, joint solid value proposition, and international missions as demonstrators.

1.2 ADMANTEX2i PARTNERS

The ADMANTEX2i partnership is composed by six European clusters: three advanced textile materials clusters (AEI Tèxtils in Catalonia as project coordinator, ATEVAL in Valencia and CITEVE in Portugal) and three advanced manufacturing clusters (PRODUTECH in Portugal, EMC2 in France and AFIL in Italy).

Together, they represent more than 800 companies – of which 488 SMEs – working in the advance manufacturing and the advanced textile materials sectors. Additionally, ADMANTEX2i consortium represents the main stakeholders of the respective regional or national innovation ecosystems, gathering more than 20 Competence Centers, 30 Universities, 70 RTOs and 40 Industrial Associations/Business Support Organizations.

Each cluster has its specific characteristics. However it can be stated that the six clusters that comprise the ADMANTEX2i partnership are representative of the whole advanced manufacturing and advanced textile materials value chains and have members in the most of the final application markets addressed in the context of the ADMANTEX2i project.

Table 1 - ADMANTEX2i Consortium partners

Participant Organization Name	Country
AEI Tèxtils - ASSOCIACIÓ AGRUPACIÓ D'EMPRESES INNOVADORES TÈXTILS	Spain
ATEVAL - ASOCIACIÓN DE EMPRESARIOS TEXTILES DE LA REGIÓN VALENCIANA	Spain
CITEVE - CENTRO TECNOLÓGICO DAS INDÚSTRIAS TEXTIL E DO VESTUÁRIO DE PORTUGAL PORTUGUESE TEXTILE CLUSTER	Portugal
PRODUTECH - ASSOCIAÇÃO PARA AS TECNOLOGIAS DE PRODUÇÃO SUSTENTÁVEL	Portugal
AFIL - ASSOCIAZIONE FABBRICA INTELLIGENTE LOMBARDIA	Italy
EMC2 – PÔLE EMC2	France

1.3 ADMANTEX2i INTERNATIONAL MISSIONS

The ADMANTEX2i partnership has selected the following three markets to organize three international business missions: USA (California); Canada (Quebec) and Japan (Tokyo/Aichi).

The first mission organized by the partnership was to California, USA, and took place from February 6th to 10th, 2023. The second mission took place from 6th to 10th November, 2023, to Quebec, Canada, and the last mission took place from March 11th to 15th, 2024, to Japan (Tokyo/Aichi).

2. INTERNATIONAL MISSIONS GLOBAL ASSESSMENT

In order to assess the successful implementation of the three international business missions, a survey was developed to collect feedback from all participants, via Google Forms. This survey sought not only to assess the suitability and interest of the program prepared by the project partners, but also to identify the main positive aspects and the greatest difficulties encountered in the approach to the selected market, as well as to assess the expectations regarding the future impact of the mission for each of the participants involved, also taking into account their specific objectives.

To objectify the analysis and make the answers comparable, qualitative evaluation parameters were defined, classified on an evaluation scale of 1 to 5. The open questions were more aimed at obtaining a critical view, comments and suggestions from the participants, in order to assess impact and identify ways of improving in future actions to be implemented.

The survey included the following 3 sections and it was used the same structure for the evaluation of the three missions. As an example, here's the one developed for California:



CALIFORNIA MISSION: ASSESSMENT SURVEY

General information:

Participant name	
Company name	
Cluster of the ADMANTEX2i partnership you are a member of	
Number of B2B meetings/visits attended during the mission with USA stakeholders	
Number of B2B meetings attended during the mission with European participants	
Number of follow-up activities planned (B2B meetings/visits to be held after the mission/ information or samples shared/ best practices exchange)	
Number of potential new partners/new customers/ business agreements to be signed	

Mision evaluation:

EVALUATION PARAMETERS	SCORE: from 1 to 5 (1 = unsatisfied; 5 = very satisfied)
Satisfaction with the proposed program/companies selected	
Suitability of the number of visits scheduled	
Suitability of the program to your organization's needs	
Networking activities organized during the mission	
Relevance of the contacts made in California	
Prospects for future collaboration with any of the Californian organizations visited	
Prospects for future collaboration with any of the European organizations involved in the mission	
Impact of the mission for the visibility of your organization in the USA market	
Organization of the mission logistics	
General mission evaluation	

Open Questions:

Positive aspects/main insights of the mission	
Main challenges faced during the mission	
Lessons learnt about technological and innovation trends in California	
Suggestions for improvement	
Will you need technical assistance for follow-up activities from the ADMANTEX2i partnership? (If yes, please specify)	

To complement the results obtained with the survey and gather a more comprehensive assessment of the 3 missions, interviews were conducted with the participants, focusing on the follow-up activities engaged and the prospects for future cooperation or business agreements to be made in the markets addressed.

The interview guidelines defined were the following (example from the California mission):

California mission – February 2023

Questions:

1. How do you evaluate the quality of the contacts made in the target market and the relevance of companies included in the mission agenda?
2. What type of activities did you consider the most interesting/relevant to your company's goals? (B2B meetings, group meetings, networking activities, visits to the shop floor, etc.)
3. Did you engage in follow-up activities with California stakeholders after the mission? Please specify (online meetings, exchange of information, visits held/planned, cooperation projects planned, etc.).
4. Are there any prospects of medium/long term collaborations with the California stakeholders? Please specify.
5. And with organizations from the European delegation? Please specify.
6. Do you consider that the ADMANTEX2i mission to California had/will have a positive impact on your organization? (Visibility, business impact, etc.)
7. What services / support do / will you need from your cluster organization in order to engage in follow-up activities with California stakeholders?
8. Are you interested in participating in another ADMANTEX2i business mission?

The same guidelines were followed for the other two missions (Canada and Japan), with the necessary adjustments. The results of the survey and interviews are presented in the following sections.

2.1 USA MISSION: CALIFORNIA

The mission to California took place in February 2023 and a delegation of 22 representatives of European SMEs, RTOs and clusters have participated and provided their feedback afterwards. All the 16 participants from SMEs and RTOs have responded to the survey above mentioned. In parallel, inputs were gathered through the interviews carried out. In general, all participants took part in every activity, meeting and visit included in the mission program.

The results obtained for the evaluation parameters are as follows:

USA-California mission evaluation and follow-up activities – Survey

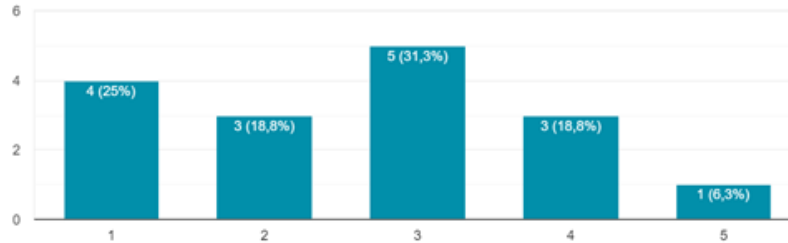
Parameters / Score	Satisfaction with the proposed program/ companies selected	Suitability of the number of visits scheduled	Suitability of the program to your organization's needs	Networking activities organized during the mission	Relevance of the contacts made in California
1	1	1	2	0	4
2	5	3	3	2	3
3	3	3	4	4	5
4	4	6	6	8	3
5	3	3	1	2	1
TOTAL RESPONSES	16	16	16	16	16
AVERAGE SCORE	3,19	3,44	3,06	3,63	2,63

Parameters / Score	Prospects for future collaboration with any of the Californian organizations visited	Prospects for future collaboration with any of the European organizations involved in the mission	Impact of the mission for the visibility of your organization in the USA market	Organization of the mission logistics	General mission evaluation
1	5	0	5	0	1
2	4	1	5	3	1
3	2	7	3	3	7
4	5	3	2	6	4
5	0	5	1	4	3
TOTAL RESPONSES	16	16	16	16	16
AVERAGE SCORE	2,44	3,75	2,31	3,69	3,44

Highlighting some parameters:

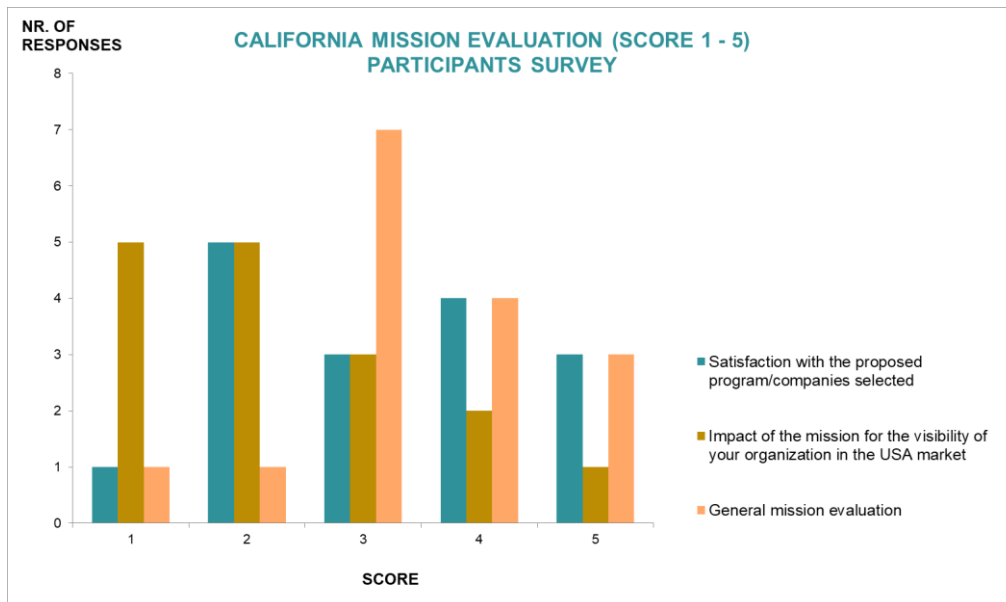
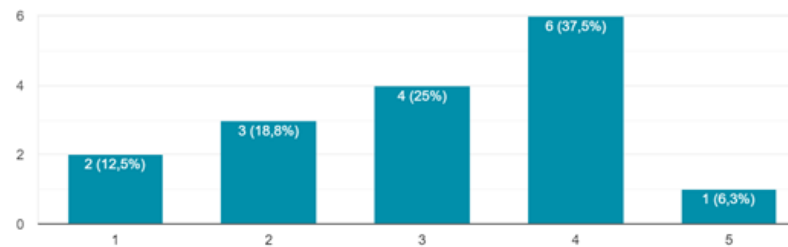
Relevance of the contacts made in California

16 respuestas



Suitability of the program to your organization's needs

16 respuestas



Analyzing the table above, we can see that, for most of the parameters defined, the average score was above 3, which is generally good, with only 3 parameters receiving an average score below 3. Still, some improvements would be needed for the following missions, in order to increase the expected impact and make the programs more attractive to the target audiences, especially SMEs.

It should be noted that the expectations of response and engagement in the approach to the American market, whose response times are generally shorter compared to other international markets, were not entirely confirmed in the case of California. Despite the initial openness of the Californian stakeholders to take part in the mission, it turned out that California has a very specific and demanding business ecosystem in terms of international cooperation, which was going through a post-pandemic transition period, so the initial expectations regarding the mission program ended up not being fulfilled and alternatives had to be found. This largely contributed to the fact that the outcomes for SMEs fell short of expectations in terms of signing business agreements to export to California in the short-term.

Nevertheless, the mission to California was valuable for participants, most of whom were making their first approach to this market, for the opportunity to get to know the local ecosystem and market rules, relevant players and the main technological trends, leaving a clear perception that the level of maturity and technological advances in Europe is in general higher than the one observed in California. The expected impact from the mission is positive for most participants and is expected more in the long term rather than in the short term and possibly with other stakeholders if no direct business agreements with the stakeholders visited emerge.

Looking at the open questions of the survey, here are the main inputs from participants, with many opinions in agreement:

1) Positive aspects / main insights of the mission

- Excellent networking among the European delegation with future collaborations in sight – there was enough time for sharing ideas, learning about the core business of European counterparts and discussing opportunities for joint projects and initiatives, some to be implemented immediately.
- Exploratory mission with very good and diverse examples of American companies and institutions of reference in California. Touring Circuit Launch, SRI International and Palo Alto Research Center (PARC) was very interesting. In the end, the agenda was balanced and the companies and institutions visited generally covered the heterogeneity of interests among the delegation.
- Great opportunity for on-the-spot knowledge of the different realities of Californian industry and assessment of the state of the art of technology in the US while getting in touch with important institutes and research laboratories.
- Being the first US market approach for some SMEs, the mission provided an insightful overview about the market and main technological trends and a good perspective on the strategy to choose to enter this market.

- There are good prospects for exploring new opportunities and collaborations between California and Europe.

2) Main challenges faced during the mission

- Diverse delegation with very different interests - the pertinence of some visits and its relevance for the company's core business was not so clear in some cases.
- Last minutes changes to the program resulted in mismatch of expectations as some visits fell short of meeting individual interests and their suitability was not the same for everyone.
- Tight schedule with many time slots for visits and meetings, which made it difficult for each SME to give a detailed presentation of its business (since the meetings were organized in group and not individualized).
- Jet lag and the long distance between the visits was challenging through the week.
- Have a direct discussion (B2B) with visited companies was very difficult due to logistics and time available (most B2B meetings among the European delegation were held during displacements).
- Establish contact with the right professional profile during each visit.

3) Lessons learnt about technological and innovation trends in California

- Insights on Robotics and specialization trends in certain TRL moments.
- Artificial vision is improving fast in California.
- Comparing to Europe, perceived American trends in terms of innovation do not differ much, highlighting areas such as Advanced Robotics, 3DPrinting, "Collaborative Robot" technologies, digital twinning, and many others. Nevertheless, these are trends that are similarly, or even more intensively, addressed in Europe than in the US.
- Most of the companies visited did not reveal a higher level of innovation and cutting-edge technology than similar companies in Europe, on the contrary.
- The Government support (state agency) for innovation and the encouragement of entrepreneurship are notorious, in particular when compared to what is still the European reality, and this is the major difference perceived. The capacity and volume of investment in innovation for American companies is much larger than in Europe, mainly in companies with a global presence.
- It was also possible to perceive, from the presentations and interactions with the respective representatives, that institutions of reference such as SRI International, PARC and NASA JPL, do not follow the tech innovation trends,

but are rather players for technology and innovation development with unquestionable global impact.

- Basic research is the key for innovation; this is the main advantage of USA comparing to Europe.
- There is still a lot of room for progress in some companies in terms of sustainability and digitalization processes, namely in the Textile industry.

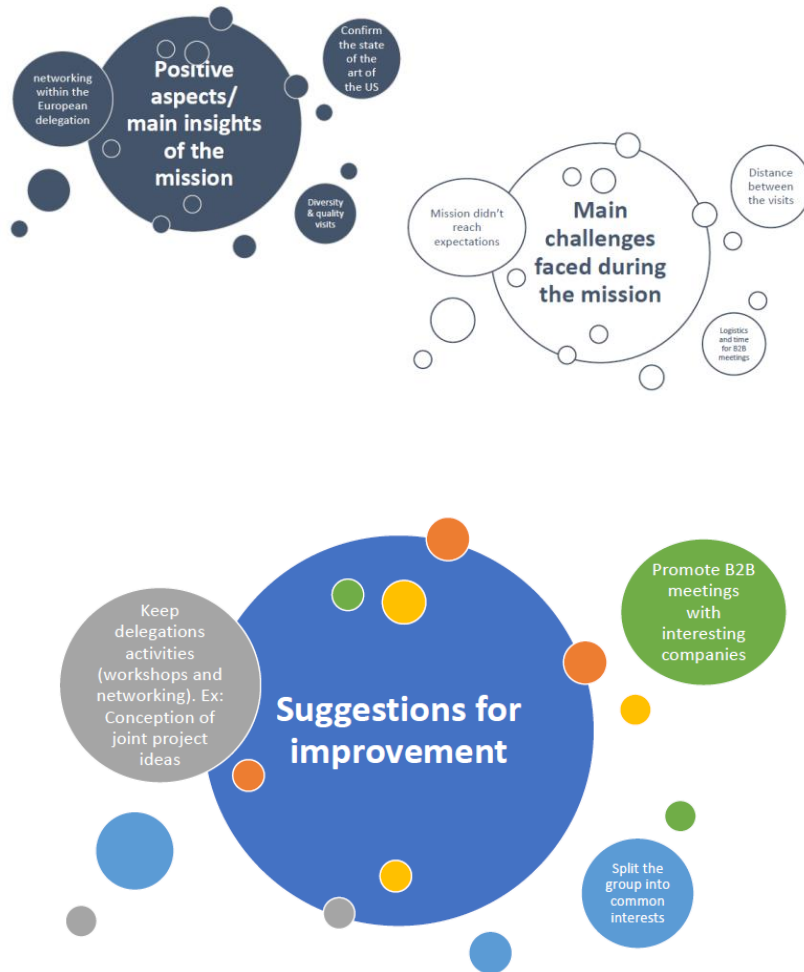
4) Suggestions for improvement

- If possible, confirm visits/meetings program further in advance and manage the expectations.
- Some of the companies visited had no technological or sustainability advances to share, comparing to Europe. Circuit Launch, PARC (Xerox) and Autodesk were the most interesting. The Robotics Fair visited was interesting as well, but the best companies present were the German ones.
- The delegation workshops and networking activities were definitely important for bonding and icebreaking. They should be included in the agenda of future missions as well, possibly with pre-defined topics such as "Conception of joint project ideas", to initiate discussion and boost follow-up actions.
- Organize visits to worldly-renowned companies and possibly split the group by sectors (textiles and advanced manufacturing) or technological areas, to better meet their interests.
- Schedule some time in the program for networking with locals to share business ideas and discuss partnerships. The agenda has to be more orientated to the companies' profiles.
- Promote more B2B meetings based on matchmaking of common interests and business profiles.

5) Will you need technical assistance for follow-up activities from the ADMANTEX2i partnership? (If yes, please specify)

- A couple of SMEs may request support from their cluster to facilitate contacts and interactions.
- All the others will not need assistance.

Summing up....



From the online recap webinar held with participants in the California mission on March 21st 2023, the same aspects and suggestions for improvement were pointed out:

- Agenda almost 100% confirmed before the Open Call for Expression of Interest.
- Include B2B meetings with interesting companies.
- Develop workshops with participants under the topic "Conception of joint project ideas".
- Minimize the distance between the visits to decrease commuting time.
- Promote networking activities among EU delegation.
- Split the group in two, according to common interests/sectors.
- Suitability of the program to participants needs (customize the agenda).
- Prioritize the quality of the visits.
- Have enough time for B2B meetings during the visits and for presenting each company.

- Establish a timeline table of the mission, working closely with local contacts to leverage the engagement of local companies.
- Prepare a parallel agenda for SMEs (Textile and Advanced Manufacturing) and for partnership clusters.

In a general overview and global assessment from all participants, the California mission fell short of business expectations, but allowed to draw some important insights on the local innovation ecosystem and to build some bridges to be subsequently explored in future interactions with Californian stakeholders. A positive impact can be expected in terms of visibility and on-site knowledge of the American market for the majority of participants.

The mission turned out to be more beneficial for the RTOs than for the SMEs, as it allowed them to learn about technological trends and state of the art innovations (particularly visiting the Silicon Valley) and explore common points of interest for future research and innovation.

The overall score of the mission is still good and it has become clear to the project partners which aspects needed to be improved in subsequent missions to make the program more attractive for SMEs.

2.2 CANADA MISSION: MONTRÉAL, QUEBEC

The mission to Quebec, Canada, did not capture as many participants as the one to California, mainly due to the difficulty in engaging Canadian companies for visits and B2B meetings well in advance, despite the fact that the Québec region has a rich and diverse business environment with the presence of many leading companies of interest in the perspective of the mission objectives. In fact, the Canadian partners chose not to promote direct contact between the European delegation and their member companies in this first approach with the European participants, which led to some companies that had applied to go to Montreal dropping out at the last minute.

Nevertheless, and despite this deviation from the initial objective of organizing a business-oriented mission with B2B meetings, at the end an interesting program has been put together, with stakeholders of reference within the Montreal business and technological ecosystem, which made it particularly interesting for clusters and RTOs, with regard to exploring possibilities for future cooperation.

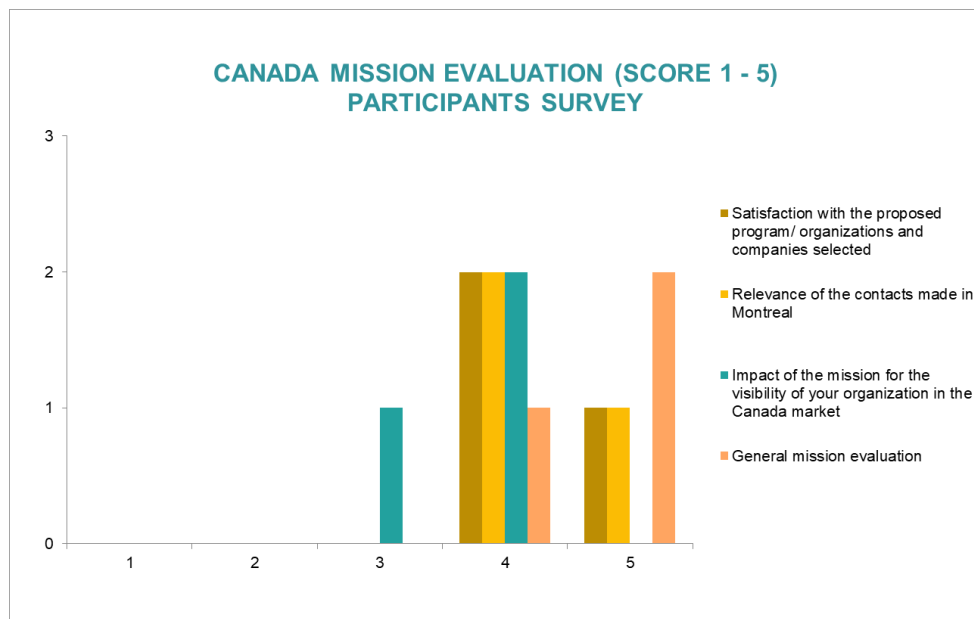
As for the SMEs, at the end only three took part in the mission (despite others have applied to the Eol), all of them active in the advanced manufacturing sector and from Portugal, France and Italy. For those three companies, the mission turned out to be positive and fruitful because it had a strong focus on the aerospace sector, which is of interest to all of them. All the three participating SMEs took part in every activity, meeting and visit included in the mission program and have responded to the assessment survey. The results obtained for the evaluation parameters are as follows:

Canada-Quebec mission evaluation and follow-up activities – Survey

Parameters / Score	Satisfaction with the proposed program/ organizations and companies selected	Suitability of the number of visits scheduled	Suitability of the program to your organization's needs	Networking activities organized during the mission	Relevance of the contacts made in Montreal
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	1	0
4	2	1	2	0	2
5	1	2	1	2	1
TOTAL RESPONSES	3	3	3	3	3
AVERAGE SCORE	4,33	4,67	4,33	4,33	4,33

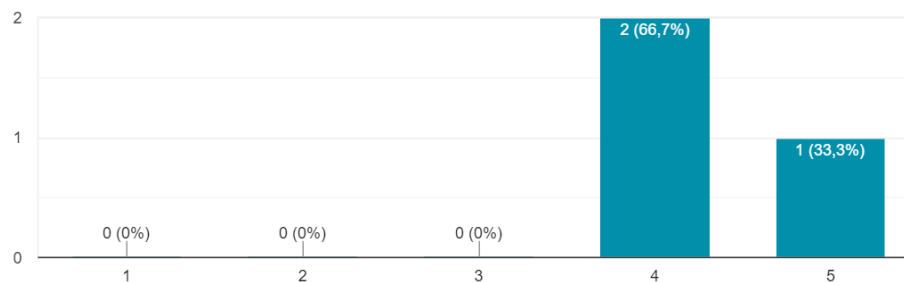
Parameters / Score	Prospects for future collaboration with any of the Canadian organizations visited	Prospects for future collaboration with any of the European organizations involved in the mission	Impact of the mission for the visibility of your organization in the Canada market	Organization of the mission logistics	General mission evaluation
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	1	0	0
4	3	2	2	1	1
5	0	1	0	2	2
TOTAL RESPONSES	3	3	3	3	3
AVERAGE SCORE	4,00	4,33	3,67	4,67	4,67

Highlighting some parameters:



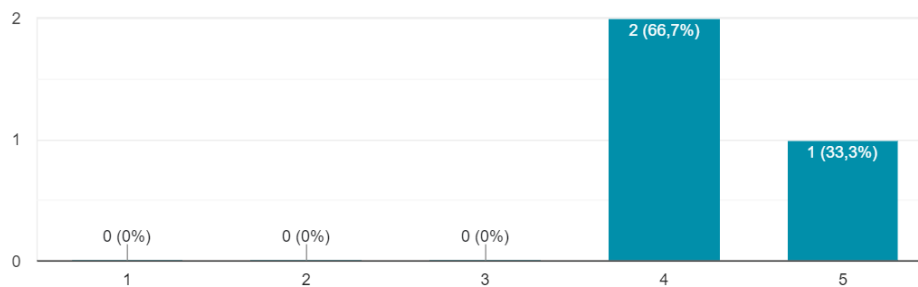
Relevance of the contacts made in Montreal

3 respostas



Suitability of the program to your organization's needs

3 respostas



Analyzing the results of the survey, although far fewer organizations took part in the Montreal mission than in the California one, the scores given to all the parameters are higher than those for California, which means that the program turned out to be interesting for the participants, who hope to reap the rewards of their interaction with Canadian stakeholders through follow-up activities to be developed bilaterally. The overall assessment of the mission to Montreal is thus very good, with good prospects for business and cooperation agreements and joint activities, also for the partner clusters of ADMANTEX2i.

Looking at the open questions of the survey, here are the inputs from the participants:

1) Positive aspects / main insights of the mission

- Understanding the bureaucracy and procedures for entering the Canadian market, particularly in the Quebec region.
- Getting a broad overview of the main players in AI, Textiles, and Aerospace markets.
- Get to know some of the competitors already present on the Canadian market.
- The opportunity to visit sectoral and R&D institutions and companies provided a comprehensive understanding of the Canadian Innovation Ecosystem. From an institutional point of view they seem very stable and working in a really coordinated way. They make huge investments in technology and have also a clear strategy on where invest the available funds.
- Discover Quebec's main innovation and technological trends and learn about Montreal's position as a gateway for exporting to Canada and USA.

2) Main challenges faced during the mission

- Keeping the necessary energy and focus for all networking activities with such a busy schedule.
- On the other hand, from a technical/technological perspective, they still have to catch up with European countries in some aspects, so there is room for collaboration.
- Understand all the English texts and comments of the participants in real time.

3) Lessons learnt about technological and business trends in Canada

- European technology is in demand on the Canadian market and most potential partners met during the mission are quite open to collaborations. The meetings provided a clearer view of how to enter and to succeed in the Canadian market.
- Good potential for business in Quebec; from a technological point of view there's great room for developing their competences and they have the opportunity to do it in a very efficient way and are also interested in establishing partnerships on this regard.
- Good insights on the Quebec/Montreal business environment and key organizations. In technological terms, they are not more advanced than European organizations and companies, so there is room for improvement.
- It has become clear that the bilateral trade agreement between Canada and the European Union has created an "appetite" for intercontinental collaborations, especially for Quebec stakeholders.

4) Suggestions for improvement

- Extend the mission over more days and keep a less busy schedule each day, so that meetings can be held more slowly and without rushing from one meeting to the next.
- Increase the number of visits to industrial companies and, if possible, include some SMEs in the program.
- Organize a more technology- and industry-oriented mission.

5) Will you need technical assistance for follow-up activities from the ADMANTEX2i partnership? (If yes, please specify)

- Participants said they wouldn't need any assistance.

In a general overview and global assessment from all participants during the post-mission re-cap webinar, it was highlighted that the Canada mission allowed drawing some important insights on the local innovation ecosystem and business opportunities for European SMEs, building up some bridges to be subsequently explored in future interactions with Canadian stakeholders. Although there was no room in the mission program for B2B meetings, there was a focus on how to do business in Quebec and channels were created for future collaborations for European SMEs wishing to expand their business to this market.

The mission turned out to be also very interesting for the SMEs operating in the fields of Artificial Intelligence and in the Aerospace market, as it allowed them to learn about technological trends, major players and state of the art innovations and explore common points of interest for future cooperation. A positive impact can be expected in terms of visibility by Canadian stakeholders and on-site knowledge of the market for European participants. The overall score of the mission resulting from the assessment survey is very good.

In the end, and given the relevance of the contacts established in Montreal for stakeholders wishing to approach the market and do business in Canada, it was somewhat disappointing that only 3 SMEs took part in the mission. Especially considering that Canadian organizations are actually keen to strengthen relations with Europe and are very open to engaging in joint initiatives and exploring opportunities for collaboration.

2.3 JAPAN MISSION: TOKYO/KOBE/AICHI

The mission to Japan, which included visits in Tokyo, Kobe / Nishi-Akashi and the participation in the [Smart Manufacturing Summit](#) 2024 in Aichi Prefecture, was able to capture a large number of participants, same as the mission to California. The mission program was confirmed well in advance and in time for the launch of the EoI and the inclusion of an anchor event in the program helped captivate potential interested parties seeking to explore concrete business opportunities.

Contacts with Japanese stakeholders started in mid-2022, since the mission was initially scheduled for the first half of 2023, and remained until the mission was completed in March 2024. In the meantime, the hiring of local consultancy services, which bridged the gap directly with Japanese stakeholders, also played a major role in achieving the objective of putting together a more business-oriented mission.

Overall, the mission assessment by all participants in the aftermath of its conclusion was very positive and all the activities included in the mission program were carried out as planned. The interaction with the Japanese stakeholders was very interesting and insightful and opened the door to future approaches and collaborations between the European participants and their Japanese counterparts.

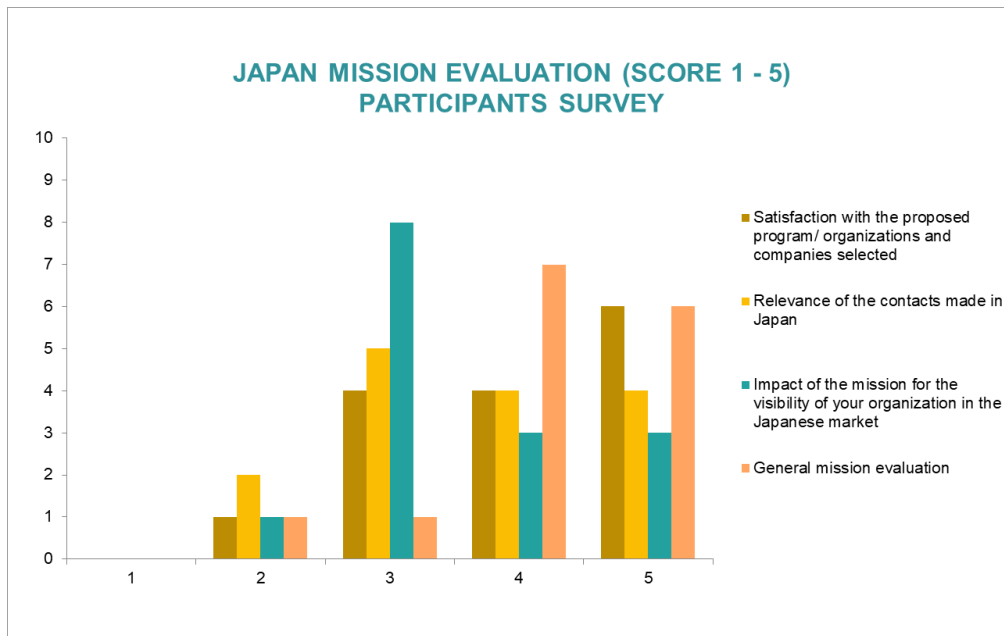
With regard to the subsequent assessment survey conducted with participants, here are the main outcomes.

Japan mission evaluation and follow-up activities - Survey

Parameters / Score	Satisfaction with the proposed program/ organizations and companies selected	Suitability of the number of visits scheduled	Suitability of the program to your organization's needs	Networking activities organized during the mission	Relevance of the contacts made in Japan
1	0	0	0	0	0
2	1	0	2	2	2
3	4	5	3	3	5
4	4	3	6	6	4
5	6	7	4	4	4
TOTAL RESPONSES	15	15	15	15	15
AVERAGE SCORE	4,00	4,13	3,80	3,80	3,67

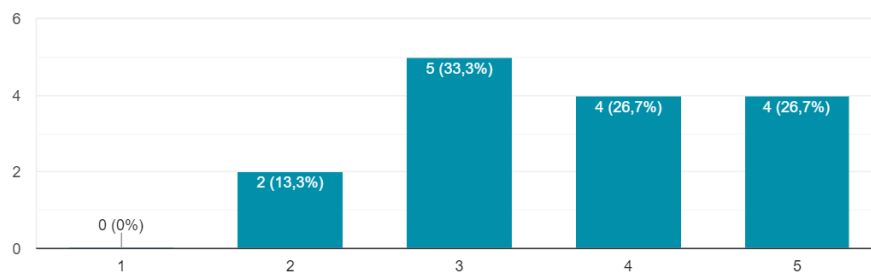
Parameters / Score	Prospects for future collaboration with any of the Japanese organizations visited	Prospects for future collaboration with any of the European organizations involved in the mission	Impact of the mission for the visibility of your organization in the Japanese market	Organization of the mission logistics	General mission evaluation
1	0	0	0	0	0
2	3	2	1	0	1
3	4	0	8	1	1
4	4	9	3	3	7
5	4	4	3	11	6
TOTAL RESPONSES	15	15	15	15	15
AVERAGE SCORE	3,60	4,00	3,53	4,67	4,20

Highlighting some parameters:



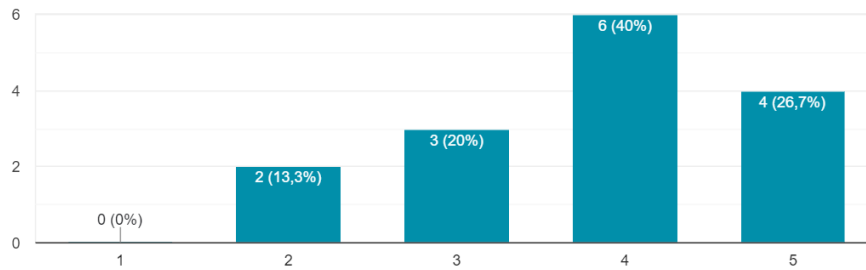
Relevance of the contacts made in Japan

15 respostas



Suitability of the program to your organization's needs

15 respuestas



Analyzing the results of the survey, we conclude that the scores given to all the parameters are higher than those for California and in line with those assigned for Canada, which means that the mission program was indeed interesting for the participants and, in general, met their expectations, with various interactions with Japanese stakeholders taking place through follow-up activities developed bilaterally. The overall assessment of the mission to Japan is thus very positive, with good prospects for business and cooperation agreements and joint activities to be implemented in the future, also for the partner clusters of ADMANTEX2i.

Looking at the open questions of the survey, here are the inputs from all participants:

1) Positive aspects / main insights of the mission

- Exploring the opportunity to conduct comprehensive market research in Japan, facilitating invaluable insights into market dynamics, consumer behavior, and industry trends. Additionally, gaining access to proven best practices within the Japanese business landscape, fostering informed decision-making and strategic initiatives.
- The mission had a very interesting, intense, diverse and effective programme.
- Great opportunity to visit reference companies/ factories and to expand the contacts network.
- The organization of the mission (agenda, logistics) was very good, all the visits were interesting.
- Good networking among the delegation members.
- Learning about a completely new economic reality, business culture and social conventions.
- Visit the shop floor of Japanese companies was interesting to compare the technologies and processes they use.
- Trade fairs in Japan are still very focused in the internal market.

2) Main challenges faced during the mission

- Overcoming the hurdles posed by Japanese cultural intricacies can prove to be a significant challenge in generating links for potential partnerships.
- Perhaps the biggest challenge lied in the nature of communication and information sharing: Japanese organizations are somewhat cautious when it comes to sharing information.
- Communication with Japanese companies, in English, wasn't easy as many of the representatives were reluctant to speak a language other than Japanese. Even with the presence of a translator, the cultural differences in terms of perception and interaction with the Japanese were often a barrier.
- The long trip and the jet lag.
- Lack of visits to Japanese companies from the textile sector.

3) Lessons learnt about technological and business trends in Japan

- In the context of the Industry 4.0 era, it was particularly insightful to witness the ways in which Japanese manufacturing companies leverage digital technologies to enhance their operational excellence. Equally intriguing was their proactive approach towards addressing sustainability concerns, aligning with the United Nations' Sustainable Development Goals (SDGs).
- Japanese organizations place too much emphasis on 'P' Planning in a context that they truly master (PDCA - Plan first, then 'Do', then Check and Act). We must understand this so that we can then develop joint activities with them.
- Need to be focused and persistent to achieve long-term goals in this market.
- Europe's technological level is very close to Japan's, so it was good to know that European companies aren't lagging behind.
- Very advanced technological development in some Japanese companies.
- Remarkable organizational skills and very meticulous internal procedures.
- Very advanced technologically with well-defined production processes, as Japan is the birthplace of Kaizen.
- Focus on sustainability and Digital Product Passport (DPP).
- Objectivity and agility of strategic planning and management
- To make business in Japan we need to focus on visiting customers and support trade shows for demonstration.
- Business relationships are built slowly, so it takes more time to achieve agreement deals.
- Insights on robotics and automation driven by an ageing population.
- Some technicians and engineers with whom the delegation interacted did not go into details about the technologies they use, which illustrated their cautious attitude towards foreigners.

4) Suggestions for improvement

- Allocate more time during business visits to manufacturing organizations for productive brainstorming sessions and in-depth debates, fostering opportunities for future collaborations.
- Selection of visits more targeted to the interests of the participating companies, in particular the textile segment.
- Try to adjust the technical level of meetings and visits to the participants' needs.

5) Will you need technical assistance for follow-up activities from the ADMANTEX2i partnership? (If yes, please specify)

- Most of the respondents will not need technical assistance from their local cluster.
- Two SMEs would like to receive support from the ADMANTEX2i partners for follow up contacts with the Japanese Chemical Fibers Association.

During the re-cap webinar organized with the mission participants on March 22nd, 2024, the main positive aspects pointed out were: (i) the logistics of the mission were very well organized and it was possible to attend all the visits on time and without any major travel problems; (ii) the visit to Kawasaki was one of the highlights of the mission, giving participants an excellent overview of the robotics industry in Japan and Kawasaki's wide range of activities; (iii) the mission gave great focus to the areas of robotics and advanced materials, major areas of interest for participants, especially those from the advanced manufacturing sector; (iv) the visit to the Toyota Commemorative Museum of Industry and Technology in Nagoya was very interesting and insightful for participants, especially as they learned that Toyota Corporation started out as a textile company; (v) the meeting with the Japan Chemical Fibers Association was very interesting for textile companies, as the Association may open the doors of Japanese textile industry for European participants, even if their companies didn't participate in the meeting.

The less positive aspects and main challenges pointed out were: (i) the SMS was a little disappointing to participants since they were expecting a bigger venue with more world renowned exhibitors willing to engage with foreign visitors; (ii) the fair also fell short of expectations in terms of establishing business contacts with Japanese companies, due to the fact that communication in English was difficult and the promotional materials provided by Japanese companies were mainly written in

Japanese; (iii) the industrial visits to Japanese companies organized by Aichi Prefecture during the SMS didn't fully meet expectations, since companies seemed unwilling to openly share their manufacturing activities and technologies, focusing more on the commercial side; (iv) the mission program was more oriented to the advanced manufacturing sector rather than to the textiles industry, which made it less interesting for participants coming from textile SMEs, so they would have preferred to have industrial visits to Japanese textile companies included in the program; (v) the mission program was very intense and lacked some time for networking among the European delegation to discuss collaboration opportunities.

In the end, and given the relevance of the Japanese market for SMEs and RTOs wishing to collaborate and/or do business there, the mission provided an interesting exploratory approach, which was the main goal established by partner clusters. In order to enhance the impact of the mission, the partnership has developed a follow-up plan to participate in joint initiatives and explore other opportunities for collaboration in the near future directed to the Japanese market.

3. LESSONS LEARNED AND KEY INSIGHTS

3.1. USA MISSION: CALIFORNIA

On April 4th 2023, an internal workshop (among partner clusters) took place to review the USA mission and discuss how to improve for the next ones.

For partners, this being the first international mission carried out as part of the project and despite the difficulties in closing the agenda, the overall evaluation of the mission was positive and allowed valuable lessons to be learned for subsequent missions and relevant contacts to be established to be explored later by cluster partners and participating SMEs.

Here are the main inputs from partners:

Clusters Internal Workshop (USA mission review)

1) General evaluation

- The mission was well organized in general and it was interesting to learn about the Californian business ecosystem.
- There was a clear mismatch of expectations between the Agenda initially announced and the one delivered – it ended up being a bit disappointing for SMEs, in terms of perceived recognition of the American companies.
- The management of the expectations should be improved, especially regarding participating SMEs (some cancelled their participation last minute; others couldn't cancel the trip so they participated, but expressed their dissatisfaction with the changes to the Agenda).
- Too many sites visited and very busy schedule, in future maybe it's better to focus on one area/city.
- In California, companies are very regularly asked to host visits from foreign organizations so, without a clear value proposition for the mission, it becomes very difficult to engage local stakeholders to agree to receive the delegation.
- From an exploratory perspective, the mission was interesting but, for the SMEs seeking to do business or established cooperation agreements with their Californian counterparts, it was disappointing.

2) Major insights

- It was great to promote networking activities among the delegation members to boost contacts and share ideas for joint collaboration. Networking between the European delegation members was valued by the participants and is expected to lead to future collaborations.
- High quality of the visits related to research centers and technological institutions. In general, the mission provided a good overview of the USA innovation ecosystem.
- It was very interesting to benchmark American textile companies against European companies, which are technologically more advanced; the norms and standards are much stricter in Europe, but US pragmatism and focus on ROI is so clear.
- The organization of the mission logistics worked well, despite demanding displacements.
- Good balance between advanced manufacturing companies and textile companies in the mission program, even though not all the visits met the interest of the participants.

3) Main challenges

- Diverse sectors and very different types of companies represented in the delegation, which made it very difficult to explain to Californian parties the delegation purposes, the clusters purposes as a partnership and what goals participants were trying to achieve in California.
- In this sense, contact and engage inspirational companies and local partners in California was a hard task – it is very important to build a strong added value proposition of the mission to present to local stakeholders.
- Mixing advanced manufacturing and textile participants in the same group visits didn't have the expected results. The two sectors should be separated in next missions, with more focus on individual agendas.
- Managing expectations that arouse from the initial agenda proposed was really challenging and developing an attractive agenda with last-minute changes occurring and keeping companies interested, proved to be quite hard at times.
- Preparing and managing the mission logistics - long distance between sites and a lot of travel time required to arrive in companies' premises.

- Making US stakeholders conscious of our calendar/timelines in order to prepare the mission - very laid back and relaxed attitude in California, lack of reply from American companies until it was almost too late to confirm visits.

4) Lessons learned

- Institutional visits should be limited to clusters. SMEs are not really interested in meeting these organizations.
- If feasible, prepare parallel agendas for each sector and for clusters to better meet the interests of all parties.
- B2B meetings are what companies are looking for in these missions, so in addition to the scheduled meetings and group visits, space should be left on the agenda for this.
- Industrial visits are valued by SMEs only if the host companies are renowned and well positioned on the market.
- Improve the management of expectations to avoid last minute drop-outs. Try not to change the agenda after the Call is launched.
- Make contacts well in advance of the mission and clearly explain the objectives of the mission and the interests of the delegation. Third countries (outside Europe) don't understand what an EU project is, or why so many different companies would be part of the same delegation.
- Keep in mind that a good organization of the mission logistics is crucial to achieve the goals established and to assure all the visits and meetings scheduled actually take place.

5) Suggestions for improvement

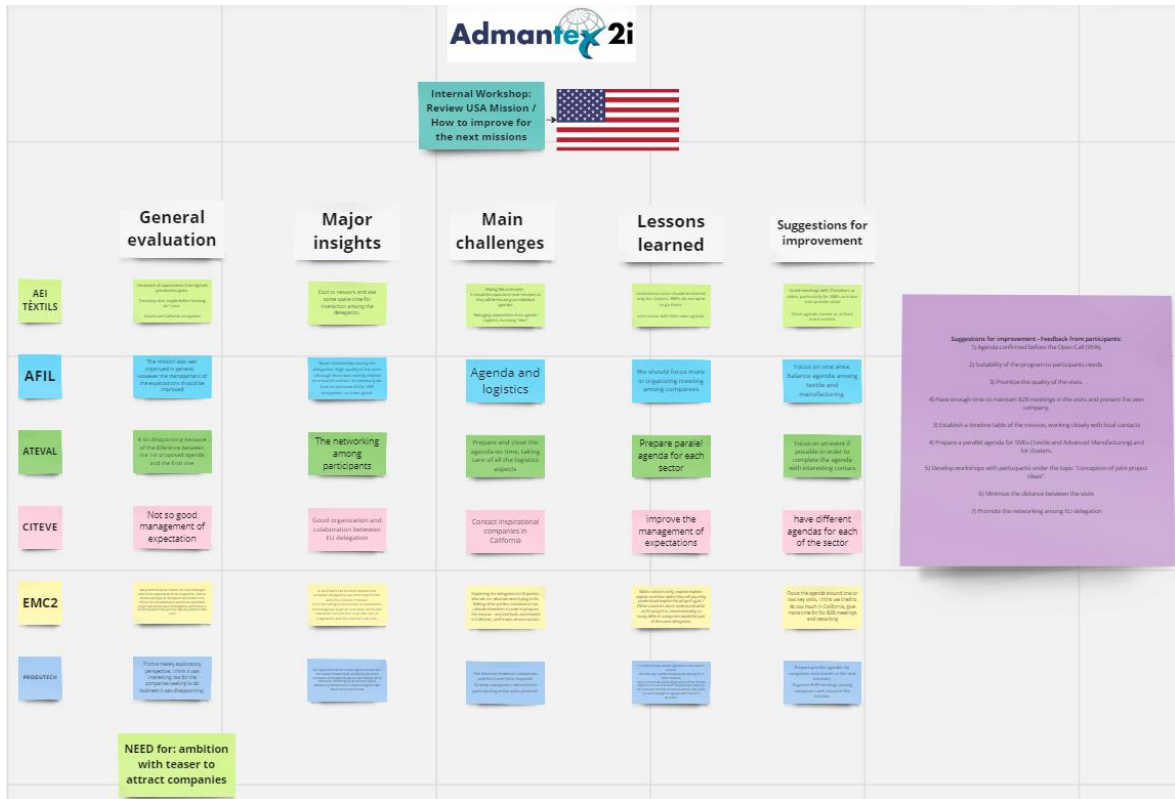
- Avoid group meetings with Chambers of Commerce and organizations alike as it does not provide added value for companies.
- Prepare parallel agendas for companies and clusters in the next missions, since clusters are looking for institutional visits and companies seek to have business meetings.
- Have different agendas for each industrial sector involved in the project and organize B2B meetings with local companies well ahead of the mission to make sure the visits meet the interests of the delegation.

- Confirm the mission agenda sooner or, at least, prepare a more realistic approach when disseminating the mission.
- Focus on one area/end market. Balance the agenda among textile and manufacturing sectors.
- Focus the agenda around one or two key visits and include in the program an anchor event, if possible, in order to complete the agenda and provide a platform for interesting contacts and B2B meetings - too many activities and visits do not generate the expected results; it's very important to make more time for B2B meetings and networking among participants.
- Need for more ambition in engaging the targeted audiences by using a teaser to attract companies.

6) Must Do / What you expect for the next missions

- Keep on the program networking activities among the European delegation.
- Pre-select interesting companies to visit in the targeted markets and prepare the agendas with focus on dedicated B2B meetings.
- Engage local clusters / sectoral associations in the mission preparation.
- Match the EU participants expectations with the (Canadian and Japanese) companies selected, to prepare a business oriented mission for SMEs and provide relevant contacts for follow-up activities.
- Launch the Call well in advance and clearly identify the objectives of the mission and the status of confirmation of the agenda to better manage expectations.
- If possible, prepare different agendas for advanced manufacturing and textiles or have a balanced agenda that meets the interests of the two sectors involved.
- Promote the signature of MoUs and business/cooperation agreements with partner organizations in third countries – this should be done beforehand.
- Try to simplify the logistic arrangements.
- Keep joint industrial and technological visits on the program and they provide a great insight on the local innovation ecosystems and the state of the art of manufacturing processes.
- Leave some free time in the program for the participants to get to know each other better and enjoy a moment of relaxation.

To collect these inputs, partners used the Miro Board tool. Here are some screenshots of the workshop.



3.2. CANADA MISSION: MONTRÉAL, QUEBEC

Following the good practice implemented after the mission to California, partners exchanged various impressions about the mission to Canada afterwards and the inputs of all the participating clusters were gathered in the Miro Board, as done previously. This being the second international mission carried out by partners, and despite the again difficulties in closing the program beforehand, the overall evaluation of the mission was positive and allowed valuable lessons to be learned for the subsequent mission (to Japan) and relevant contacts to be established in order to be explored later.

Here are the main inputs from partners:

Clusters Internal Workshop (Canada mission review)

1) General evaluation

- The mission was very interesting and a great introduction to the Canadian market and how to do business in Montréal.
- The mission provided a great opportunity to assess the cooperation opportunities for European SMEs from the textile industry. There's a huge potential for future collaborations in the field of advanced materials.
- The mission had a strong focus on clusters and less on industrial companies. This focus proved to be particularly valuable for some clusters. From a cluster perspective, it was a great opportunity to meet similar organizations with aligned objectives and to discuss the potential for future cooperation activities.
- The mission has been organized in detail in the previous months, so the programme was fully respected once there, with no unforeseen/exceptional issues related to logistics or stakeholders to meet, and in general the delegates were satisfied, even if the expectations for a business-oriented mission were not fully met.
- Despite the original objective of organization a business mission, at the end the mission became mostly exploratory, institutional and technology-oriented in nature, instead of business-oriented. This was due to the difficulty in contacting directly with companies (through the stakeholders involved) or organizing B2B meetings (through intermediaries) without investing financial resources.
- Overall the mission was quite interesting, in terms of contacts made and knowledge acquired, and the logistics was well organized, so it was disappointing that a number of SMEs pulled out ahead of the mission and only 3

companies were involved. Still, the programme was relevant and opportunities for cluster exchanges between European and Canadian parties were identified.

2) Major insights

The visits and meetings provided a comprehensive insight on the Quebec/Montréal innovation and business ecosystem and allowed discussion of business opportunities to be explored in Canada, namely the following:

- The programme included meetings with some key institutions and specific visits related to Advanced Manufacturing, Advanced Textiles and Fashion, Advanced Materials, Additive Manufacturing, Aerospace and Artificial Intelligence.
- Good insights about AI driven economy, major technological advances and on the industries that are currently in focus: Manufacturing, Transportation, Retail, Energy & Utilities, Agriculture, Mining, Health, Defense and Security.
- Presentation of the main trends of investment and innovation for Canadian stakeholders: Digital Technology, Plant Protein Innovations, Next Generation manufacturing, AI-powered supply chains, Ocean, Aerospace and advanced technologies (like Quantum technology).
- Huge funding opportunities and government support schemes to digitalization are available for Canadian industries, Universities, Research Institutes and Advanced Materials Ecosystems, provided by the Canadian government, namely to 'import' skilled workers and researchers.
- Main available categories for funding are intended for advanced materials production (Polymers/Membranes, Metals/Alloys/Metal Powders, Nanomaterials, Composites; Coatings, Semiconductors, Biomaterials, Glass, Concrete, Engineered Wood, etc.), finished and semi-finished product integration (electronic, electric and optical components, sensors, optical lasers, biocompatible components, technical intelligent textiles, packaging, advanced chemicals) and process and instrumentation development (surface modification and treatment, Additive Manufacturing, Quantum Computing, AI applied to materials, Micro/Nanofabrication, Recycling/Electrochemistry).
- Crucial insights on the support available for foreign companies setting up in Montreal and for attracting external competences and talents. Generally, the mission highlighted that setting up in Canada is a favorable option for entering the North American market.

- Canadian/Quebec market is rather open to external companies installing there. Canada is a particularly privileged gateway to the North American market and further steps taken to explore potential synergies would be very welcome.
- Quebec has a very mature, high-performance industrial ecosystem that rivals the best in the world. Numerous interventions discussed regarding their differentiating factors and what they do best.
- Canada, and Quebec in particular, has implemented innovation policies and cluster/R&D/business support organizations that are very similar to those existing in Europe and therefore there are many possibilities for collaborations. It is easy to find similarities and common points of interest for joint actions to be undertaken with Canadian stakeholders.
- The “twin transition” of digital and green industry is the key subject in current Canadian innovation policy and some very interesting programs are underway to support the businesses towards these transition. It would be very interesting to benchmark these initiatives further in order to enrich EDIH programs in Europe, for example.

3) Main challenges

- Canada faces a talent shortage across various industries, hindering innovation and growth. To overcome this bottleneck, Canadian side is looking for opportunities to bring skilled workers and researchers to Quebec and looking for investments from EU.
- On the EU side, companies are looking for exploring business opportunities in Canada and R&D organizations are looking for establishing innovative collaborations. In this scenario, one big challenge during the mission was to find common interests and identify cooperation opportunities for both sides during the meetings.
- Bringing a business/commercial dimension to the mission was not a straightforward option. Every meeting and visit primarily had a focus on innovation, with few occasions to move the discussion towards business opportunities. However, many of the stakeholders met have direct contacts with companies (usually their members), so there could be room for developing those contacts through the relationship established during the mission.
- The preparation of the mission program, namely the inclusion of B2B meetings, was strongly conditioned by the lack of budget to hire a local consultant: the

mission co-coordinators have spoken to many stakeholders that provided help for free. Further support from a local Business Support Organization, Chambers of Commerce or National Trade Agencies liaison offices would have required budget for consultancy that was not available within the project.

- A part of the activities (even if not business-oriented) were targeted at textile companies, so the withdrawal of the European textile SMEs in the last weeks before the mission made those meetings interesting just for the textile clusters coming and less for the other delegates. No textile SMEs represented in the delegation partly compromised the objectives of the textile-oriented visits.
- It proved difficult to ensure the participation of SMEs without having a confirmed program well in advance and, on the other hand, it was difficult to confirm the program without having the confirmation of participating SMEs. Furthermore, since some SMEs dropped out of the mission after submitting applications to the Eols, there was a lot of doubt in the weeks before the mission about the composition of the delegation and thus the confirmation of the program was seriously compromised.
- The diversity of sectors and interests represented in the ADMANTEX2i project meant that it was not always so easy to capture the attention of the organizations we would like to visit in Canada, as they do not necessarily understand why hosting such a diverse delegation can bring opportunities that match their interests and are also unfamiliar with the concept behind European cluster partnerships.
- 3,5 days for all the visits included in program was quite tight; it would have been better to have spread the program throughout 4 - 4,5 days that would have left more room for networking among the delegation and for some individual arrangements.
- From a learning expedition point of view, the mission achieved its goals; from a business-oriented point of view, the mission fell short of expectations.

4) Lessons learned

- There were a lot of diverse visits and overall the experience was positive and enriching. Interesting aspects about advanced materials and technological innovations were disclosed. There seems to be many possibilities for collaboration in the future.

- The experience proved enriching in terms of fostering relationships among participants and with Canadian stakeholders who are open-minded. The mission provided a great opportunity to learn how to contact, network and find business opportunities for EU SMEs from advanced materials industry. Understanding how other institutions and companies operate contributes for benchmarking organizational structures and business models.
- The Canadian, and Québec institutions in particular, foster R&D+i activities by providing financial support to their research entities and companies. In addition, there is high attention towards the attraction of foreign talents as a way of getting around the lack of skilled labor internally.
- In addition, Québec province is a bridge between the European and US culture and market, so this information and direct experience in Montréal could be useful to support (member) companies or institutions choosing their target markets in North America.
- During initial contacts we should always try to find out as much as possible about the organizations before setting up the visits, since some of the visits didn't add much knowledge in the context of the delegation's interests. It is thus important to understand beforehand what benefits and additions the visits / meetings can bring to the organizations that will travel to the market in question.
- There is a lot of room for collaboration between European and Canadian business support organizations, as they have very similar innovation support ecosystems. A number of actors contacted have programs in place similar to those in Europe for accompanying companies towards the “Twin Transition” and there are a lot of potential collaborations to be explored in this regard.
- This mission has helped to identify players that could provide collaboration opportunities in the short term (Scale AI, Aero MTL and CTT Group), as well as a number of different institutional partners willing to support international businesses installing in Canada (MTL International and Investissement Québec) and serve as an entry point into the local innovation ecosystem.

5) Suggestions for improvement/What you expect for the next missions

- Due to the tight schedule of the mission program, the delegation had to rush to get to the next meeting on time, which could have been avoided if the agenda had been less concentrated on each day and included an extra day in the mission program.

- The type of industries, research fields, companies' profiles and clusters visited was very diverse. For the next mission, the stakeholders to be met should be more aligned with the mission goals and with the needs of the companies selected via Call for Expression of Interest.
- Try to have the programme closed before the end of the EoI and include an industry fair to attract SMEs and better manage expectations. This is, of course, a difficult balance to strike, given the nature of the Calls for EoI.
- Promoting individual networking experiences could further enhance the overall mission outcomes and make it more attractive to companies. Hire support from local agencies or consultancy services, so that the program can be more oriented towards B2B meetings and matchmaking events with local companies.
- It was clear that for Canadian clusters it is harder to mobilize their members when hosting us, than for their European counterparts, due to the difficulties that arise from having such a diverse delegation with very different interests and objectives, and so the business opportunities were not so clear for participants.

To collect these inputs, partners used the Miro Board tool. Here is the screenshot:

	General evaluation	Major insights	Main challenges	Lessons learned	Suggestions for improvement
AEI TÈXTILS	The mission to Canada was a great opportunity to evaluate the possibilities for European SMEs from textile industry. A huge potential for future collaborations in the field of advanced materials.				
AFIL					
ATEVAL	We considered that the missions were predominantly oriented on clusters rather than individual companies or intermediate entities. This focus seemed particularly suitable for AFIL.				
PRODUCTECH	Overall the mission was quite interesting. It was a pity that we only had 3 companies involved.	Canadian/Quebec market is rather open to external companies (including start-ups) in an environment like the USA - interesting government support schemes to digitalisation	3-5 days for the visit with 4-5 days would have been better to have 4-5.5 days. Maybe could have left more time for networking both with the delegation and with individual entrepreneurs - receive SMEs represented	It is good to have more than one mission (including the mission to e.g. France or Italy) and to have a follow-up mission (e.g. France or Italy) to have a better understanding of the market and to have a better understanding of the market and to have a better understanding of the market	try to have the program closed before the end of the EoI to attract SMEs and manage expectations - define a more realistic schedule (not too long/complex)
EMC2					
CITEVE	Citeve did not take part on the mission	Citeve did not take part on the mission	Citeve did not take part on the mission	Citeve did not take part on the mission	Citeve did not take part on the mission

3.3 JAPAN MISSION: TOKYO/KOBE/AICHI

On April 9th 2024, an internal workshop among the project partners took place at the headquarters of AEI Tèxtils, in Terrassa, to discuss the main insights, outcomes, challenges and lessons learned from the mission to Japan. This in-person meeting provided an excellent opportunity to evaluate the main outcomes and the general impact expected for all the three international missions.

Overall, the assessment made by partners for the mission to Japan was very positive and the contacts established were very interesting and useful for future exchanges to explore collaboration opportunities and share strategic information with the Japanese stakeholders. Taking into account that the conclusion of the project takes place shortly after the mission to Japan, most of the expected results and follow-up activities to be undertaken will take place after the completion date of the project.

Here are the main inputs from partners:

Clusters Internal Workshop (Japan mission review)

1) General evaluation

- Lack of textile visits.
- The mission has been planned with a good balance between meetings, visits and matchmaking activities.
- Good logistical organization.
- The main focus of the mission was Advanced Manufacturing (AM), so for the clusters operating in this sector it was in line with their activities and interests.
- For the textile side, it would have been more fruitful to have more visits to textile companies on the program.
- Mission went as planned and the visits included in the agenda were interesting for both SMEs and RTOs, especially for those from AM. Connecting with the Japanese stakeholders was not so straightforward as in Canada and USA, since Japanese need more time to understand the purpose of the interaction and communication in English can be a little difficult at times.
- Kawasaki robotics was the most valued visit by SMEs and RTOs, as well as the visit to Toyota Museum.
- The mission provided very good understanding on how to do business in Japan. Some very interesting visits, particularly to benchmark manufacturing in Japan and the local business mentality.

- The mission offered an excellent opportunity to get in direct contact with the Japanese business reality and main players.

2) Major insights

- Need for good local consultants to enter the market.
- Difficult communication, even in English.
- The focus on robotics (on the second day) was very useful. The overview on chemical fibers was also very interesting.
- The development of business connections, particularly within the textile sector, it was not feasible to achieve. The textile sector in Japan is located in a different geographical area to those covered, so it wasn't possible to visit it in one-week.
- Japanese companies are really big and it's not easy to identify the ideal person to contact. Hierarchy is very important in Japan and their business culture makes it very difficult to engage them for any sort of commitment, apart from organizing visits or group meetings. The Japanese take a lot of time to engage in commercial or cooperation relations with foreign organizations, so it was not a surprise that signing a MoU was not feasible after the mission.
- Plan long term by building relationships and trust is extremely important to enter the market. It's impossible to do business in this market without professional translation services and local support intermediaries.
- In general, European companies are not lagging behind their Japanese counterparts in terms of the degree of digitalization and automation of production processes, which is very encouraging.
- They are advanced in robotics.
- Excellent functioning of the transport system in Japan, which allowed the logistical organization of the mission to work very well.

3) Main challenges

- The business culture and the language barrier were the main challenges.
- Tight schedules and travel logistics was challenging, but it was well managed by the organizers, so everything went smooth.
- The cultural differences and the protocols to be followed. Japanese organizations are very demanding in terms of internal procedures and hierarchy is very important and must be respected under all circumstances.

- To establish a relationship with stakeholders it is necessary to think in terms of the long term. Decision-making timeframes are not the same as in Europe and this should not be underestimated.
- It took a lot of time to engage stakeholders and prepare the meetings/visits. The logistic arrangements were also challenging, but in Japan transportation works really well and everything went as planned.
- Language for communication was also a challenge, since many Japanese are not comfortable speaking English and prefer to have a translator present when interacting with foreigners. The quality of the visits often depended on the quality of the translator, so a well briefed translator is an important aspect.
- The Smart Manufacturing Summit did not meet expectations, contrary to what the organizers of the event had predicted.

4) Lessons learned

- There is a huge linguistic and cultural barrier between Europe and Japan. The complexity of the Japanese business culture and the time needed to engage in actual business agreements must be taken into account when approaching the market.
- Hiring a local consultant or ambassador as facilitator is a key factor to succeed in Japan.
- Good preparation before the mission and support of an interpreter is crucial for the meetings. It's important to ensure the interpreter knows well the sectors and markets involved.
- Japanese associations do not involve their companies in first meetings with foreign organizations. They are very cautious in the first contact.
- Signing MoUs or cooperation agreements is not something we can approach in a first visit, since they need a lot of information before committing to sign any sort of document and they take time to decide.
- Missions including a lot of different locations with tight schedules are very exhausting for participants and end up not providing enough time for networking among the delegation members, so in future activities it would be convenient to reserve some free time in the program for this purpose.
- Sustainability has become an increasingly important issue in manufacturing, as the environmental impact of production processes has become more apparent. In Japan, sustainable manufacturing has been a priority for many years, as the


country has faced significant environmental challenges due to its industrialization. Japan has a long history of technological innovation, and the country has used this expertise to develop a range of sustainable manufacturing practices.

- One of the most significant factors contributing to Japan's success in sustainable manufacturing is its emphasis on efficiency. Japanese manufacturers have long focused on reducing waste and improving production processes to maximize efficiency. This approach has helped to minimize the amount of energy and resources required to produce goods, which has in turn reduced the environmental impact of manufacturing.
- To make business with a Japanese corporation and/or develop a cooperation project we need much more time and to exchange a lot more information than when doing business with European organizations.

5) Suggestions for improvement

- Include in the program key visits for both Advanced Manufacturing and Textiles and plan separate meetings for the sectors involved to better meet the interests of participants.
- In the missions, there is a need to bring some relevant contacts home. So, to choose an exhibition with more international potential could be useful.
- Include a networking activity with the European delegation at the start of the mission, so participants get to know each other in the first day.
- Include more networking activities among the delegation to boost business opportunities between the EU partners.
- Try to focus the mission/activity in 1/2 geographical area(s) close to each other to avoid a lot of time spent in displacements, and choose 3 nuclear local stakeholders that can actually provide business and cooperation opportunities or SMEs and RTOs.
- Organize a guided tour of a trade fair with all members of the group.

To collect these inputs, partners used the Miro Board tool. Here is the screenshot of the workshop organized.

					
Internal Workshop: Review Japan Mission 					
	General evaluation	Major insights	Main challenges	Lessons learned	Suggestions for improvement for future actions
AEI TEXTILS	Lack of textile visits Good organization :)	Need for good consultants to enter the market. Hard communication.	Culture. Language	Timing needed. Complexity Local ambassador	Separate meetings AM/TEXTILE
AFIL	The mission has been planned with a balance between meetings/visits and networking activities. The main focus of the mission was Advanced Manufacturing for AFIL, it was in line with its activities and interests.	The focus on robotics (on the second day) was very useful. The overview on chemical fibers was also interesting.	The cultural and language barrier was a challenge. The topics of the mission was challenging as well, but it was well managed by the organizers, i.e. everything went smoothly.	There is a huge linguistic and cultural barrier between Europe and Japan. Preparation before the mission and support on the spot (i.e. an interpreter) is needed.	The balanced mix between meetings and networking activities is good. However, there is a need to bring some contacts home. So visits were an addition with more potentially could be useful.
ATEVAL	The visits included in the agenda were really interesting for all delegation. Especially, robotics was the most valued by participants and the visit to Toyota Museum.	The development of business connections, particularly within the textile sector, is not too flexible to achieve. The trade is located in a different area far away, with no options to visit or bring over some mission.	Cultural differences and protocols to follow. Long time to establish a relation with stakeholders. Trust the organizers of the SME, which did not meet expectations.	Important to have a local contact	Include visits for Textile, Advanced manufacturing and textile by language barrier. Include more networking activities among delegation.
FOODTECH	Mission was planned according to both needs of the agenda for the delegation and the general objectives set in the agreement. Technical visits, meetings and networking were all included in the agenda. The mission was well organized and the participants were able to attend the mission with a high level of interest.	Japanese companies are very open and they really liked the mission. However, they really liked the idea of business visits. They were very interested in the mission and they were very open to the idea of a partnership. They were very interested in the mission and they were very open to the idea of a partnership.	Cultural differences, communication barriers, technical differences and language barriers. The biggest challenge was the language barrier. The Japanese companies were very interested in the mission and they were very open to the idea of a partnership.	Japanese companies are very open and they really liked the mission. However, they really liked the idea of business visits. They were very interested in the mission and they were very open to the idea of a partnership.	Try to focus the mission activities in 1/2 day program that evening and 1/2 day program that evening. Try to focus the mission activities in 1/2 day program that evening and 1/2 day program that evening.
EMC2	A very interesting mission which allowed to get a very good understanding on how to do business in Japan. Some very interesting visits, particularly to advanced manufacturing in Japan and the local business reality.	The mission was very interesting and it was very useful to have a direct contact with the Japanese business reality. The mission was very interesting and it was very useful to have a direct contact with the Japanese business reality.	Language barrier was a challenge. The quality of the trade fair was not so good as expected. The mission was very interesting and it was very useful to have a direct contact with the Japanese business reality.	There has been a language barrier with the Japanese companies. They were very interested in the mission and they were very open to the idea of a partnership.	More networking between the EU delegation in order to work on potential collaborations between the EU partners. Organize a guided tour of any trade fairs, with the group.
CITEVE	An excellent opportunity to get in direct contact with the Japanese business reality.	Advance in robotics. Very good mission organization.	Language (English is not generally spoken) and the cultural differences.	To make business and/or develop cooperation project need much more time than needed between European organizations.	Include a networking activity with the European delegation at the start of the mission. Plan advanced meetings to the advanced levels and advanced manufacturing.

4. FOLLOW-UP ACTIVITIES AND MOU SIGNED

The main purposes of the three international missions were: (i) to create a bridge between European SMEs and RTOs and their respective counterparts in the countries visited; (ii) to foster the exchange of knowledge, best practices and inside information on innovation ecosystems; and (iii) to establish important contacts with local key stakeholders, which would lead to many other internationalization actions later on, both for companies and partner clusters.

In this context, the objectives of the missions are not entirely achieved at the end of their implementation, but rather aim to initiate long-lasting and fruitful cooperation relations for entities seeking to do business in these countries and for partner clusters seeking to deepen their international cooperation with these markets.

Therefore, a series of follow-up activities were planned, some in advance and others during the missions implementation, to be carried out afterwards and will continue to be carried out after the end of the project, both on the clusters' side and on the SMEs' side, to ensure that the results achieved are leveraged through complementary actions and that the impact generated is effective and enduring for European participants. These follow-up activities include, or are intended to include, but are not limited to, the following actions:

- Subsequent contacts (mostly by email) with stakeholders in the 3 markets to exchange information, disseminate relevant events and initiatives and discuss further opportunities to be explored;
- Exchange of best practices on internationalization, innovation, sustainability and digitalization;
- Organization of online meetings and events (webinars, workshops) to share knowledge and opportunities;
- Signature of MoUs / cooperation agreements with key stakeholders in the 3 countries (e.g. associations, clusters or institutional organizations) aimed at ensuring cooperation and mutual assistance in the promotion of internationalization initiatives;
- Discussion of cooperation projects to be developed in the near future;
- Planning of potential visits to be organized in the near future (industrial visits, exploratory visits to R&D institutions, reverse missions, B2B meetings, etc.);
- Joint participation in international events (trade fairs, conferences, seminars).

In this regard, the partnership has developed a dedicated follow-up plan as part of the revised long term cooperation strategy and roadmap for each international market explored, including activities such as: participation in international trade fairs, organization of joint events (webinars, workshops), exchange of information and samples, promotion of international B2B meetings and matchmaking events, exploration of opportunities for potential C2C cooperation projects, organization of inverse-missions to host visiting stakeholders from those countries, etc.

These long-term cooperation strategies with each international market will also be supported by the cooperation agreements and MoU signed during the missions. In the following section, it's presented the detailed follow-up plan for each country.

4.1. USA MISSION: CALIFORNIA

For California, partners' follow-up plan was to start by signing a MoU with one of the organizations that were part of the mission program, namely with CMTA - California Manufacturers & Technology Association, with whom contacts in this regard are still ongoing, and explore other prospective cooperation agreements, based on contacts made during the mission and others established in the meantime.

The business environment in California has undergone many changes since the pandemic, so companies and sectoral organizations are still adapting to the new circumstances and trying to adjust their internationalization strategies to their actual needs and those of their business partners. In this context, securing the commitment of local partners to ensure follow-up activities has proved to be a key challenge, even with regard to business associations and technology organizations.

Nevertheless, there is a lot of potential in the USA for developing internationalization activities that could leverage the results of the mission. In this regard, as part of the follow-up plan and roadmap for USA, the partners intend to explore and organize missions to other regions of the country, participate in trade fairs and identify other key stakeholders to engage for joint actions, like webinars and exchange of best practices.

Regarding the follow-up activities undertaken by participants in the California mission, and according to the inputs from interviews and informal contacts held with SMEs, being the California mission mainly exploratory in nature, there were few prospects for follow-up contacts with American stakeholders for business purposes. The mission was positive for participants from a learning perspective, but the tight schedule of the visits

and the lack of openness of American companies to explore business opportunities with their European counterparts in the short term, meant that there was little room for discussion of actual opportunities to be explored later on. Even so, some SMEs did not rule out the possibility of extending their contacts to other organizations of interest in California, leveraging the support offered by institutional partners in the USA.

For some participating RTOs, though, the mission proved to be more aligned with their objectives and interests, namely in terms of assessing the technological maturity of local companies and the latest technological advances in R&D organizations, and some of them have engaged in online follow-up meetings with some Californian organizations visited, in order to exchange corporative information and discuss innovative solutions and cutting-edge technology for digitalization and sustainability.

Overall, some 58 follow-up activities (mainly online meetings and exchange of information by email) were carried out or planned after the mission and 26 potential new partners / new customers / business agreements to be signed were identified by all participants.

In the short term, there are no prospects of an effective collaboration with Californian stakeholders, but bilateral exchanges have remained active for some participants one year after the mission. In the medium/long term, in case an opportunity arises for a reverse mission from Californian organizations to Europe, some participants would be interested in hosting the American delegation for an exploratory visit to their facilities.

In the meantime, ongoing contacts between the EU participants have been far more dynamic than those with Californian entities, both for companies and RTOs, and for some of them there are good prospects of establishing partnerships and collaborations, namely in the scope of the EU-funded projects.

4.2. CANADA MISSION: MONTRÉAL, QUEBEC

Valuable contacts were established in Montreal aimed at exploring future opportunities for collaboration with the partnership clusters or at promoting business agreements between the European companies and their Canadian counterparts. The stakeholders engaged seemed to be very open to foster collaboration with the European delegation and there are good chances of establishing partnerships in the short/medium term.

In this context, the ADMANTEX2i partnership has signed a MoU with PRIMA - Pôle de Recherche et d'Innovation sur les Matériaux Avancés (Advanced Materials Research and Innovation Hub) to foster future joint cooperation opportunities on internationalization and innovation in the sectors of advanced manufacturing and advanced textile materials. By signing this MoU, both parties agreed to cooperate in supporting the dissemination activities of each party, promoting joint events and cooperation activities (like webinars/ workshops), facilitating the organization of B2B and/or C2C meetings and matchmaking events with SMEs, exchanging relevant information and best practices, etc.



As part of the follow-up plan for the Canadian market, contacts with PRIMA, Aero Montreal, Scale AI and other organizations are also planned to be held in the coming months. Also, some partners have shown interest in keeping future exchanges with some of the institutional stakeholders visited in Canada, like Montreal International and Investissement Québec International, to facilitate contacts between their companies and the Canadian stakeholders. These contacts will focus on discussing business opportunities and organizing a learning expedition to Montreal in 2024 and a reverse mission to Europe.

In addition, the project coordinator, AEI Tèxtils, is following up with the Canadian Textile Industry Association, with a meeting held, as a reverse mission, during the fair Techtexsil, organized in Frankfurt in April 2024. The executive director showed interest in exchanging information regarding new technological developments, particularly in the field of fluorine-free solutions for textile finishing, where AEI Tèxtils is involved. Further discussions on the signature of a MoU are expected over the next months.

As for the participating SMEs, and based on the inputs collected through the mission assessment survey and the interviews conducted, being the B2B meetings and field visits the most valued types of activity for engaging stakeholders, participants sought to organize online follow-up meetings and exchange follow-up emails with some of the contacts made during the mission. One of the participants also planned an in-person meeting with Montreal International representatives, who will be visiting Europe to participate in an international event.

In general, participants identified good prospects for future collaborations with the Canadian stakeholders visited, namely PRIMA, Scale-AI and Aero Montreal, who can mediate the connection for their companies. Also, collaborations were discussed between some of the organizations in the European delegation, for example to develop joint project proposals within the framework of European funds.

The mission to Montreal is expected to have a positive impact for participating SMEs, not only for the opportunity to get a comprehensive insight on the Canadian market, but also for the chance for European companies to make themselves known to their Canadian counterparts and thus increase their visibility internationally.

Overall, at least 8 follow-up activities (mainly online meetings and exchange of information by email) were carried out or planned after the mission among the 3 participating SMEs and 6 potential new partners / new customers / business agreements to be signed were identified by participants. In addition, there are some collaboration projects in the pipeline among clusters.

4.3 JAPAN MISSION: TOKYO/KOBE/AICHI

For Japan, partners' follow-up plan was to sign a MoUs with one of the Japanese stakeholders visited during the mission, similar to the approach followed in California and Canada. However, despite the efforts made, this objective was not achieved before the end of the project, but contacts with Japanese organizations will continue in the coming months, in order to strengthen relations. Given the characteristics of the Japanese market and the complexity of corporate relations, it is normal for the signing of cooperation agreements to take longer than in other countries.

Nevertheless, valuable contacts were established with institutional partners, like the Aichi Prefectural Government, the Japan Chemical Fibers Association, as well as other partners with local support teams, namely the organizers of the Smart Manufacturing Summit, therefore future cooperation agreements are still on the radar for partner clusters seeking to discuss joint opportunities with the Japanese counterparts, such as business missions to other regions of Japan, a reverse mission to Europe, etc.

In parallel, ADMANTEX2i partners will seek to explore synergies for joint initiatives and debate cooperation agreements with other Euroclusters that are targeting the same countries in their internationalization strategy, while keeping up to date with the opportunities created by the EU-Japan Center for SMEs and clusters for closer collaboration with Japanese counterparts.

Analyzing the follow-up activities undertaken by participants in the Japan mission, and according to the inputs from interviews and informal contacts held with SMEs and RTOs, the mission is expected to have a positive impact by triggering potential future collaborations and providing the opportunity to get a comprehensive insight on the Japanese market and business culture. Also, it provided the chance for European SMEs to make themselves known to their Japanese counterparts and other European participants, which contributed to increase their international visibility.

In particular, after the mission participants engaged in online meetings to present their organization in detail and exchange of information to bolster collaboration and explore opportunities for business agreements with Japanese companies interested in deepening collaboration with Europe. In this context, there are good prospects for medium to long-term business collaborations with the Japanese companies, as well as among some of the European participants.

In this sense, some participants have developed a medium/long-term collaboration plan to strengthen their business relations with the organizations contacted, including further exchanges with the JCFA, future visits to Japan, collaboration in the scope of the Digital Product Passport initiative and joint research activities and cooperation projects with the European counterparts. It is also interesting to note that one of the participating RTOs has contacted the European representative of Denso Corporation, one of the Japanese companies visited during the Smart Manufacturing Summit, and hopes to start incorporating equipment from this manufacturer into its solutions soon.

Overall, at least 30 follow-up activities (mainly online meetings and exchange of information by email and business proposals) were carried out or planned after the mission among the 14 participating SMEs and RTOs and 28 potential new partners / new customers / business agreements to be signed were identified by participants.

5. CONCLUSIONS

This report, as part of the Task 2.3 – “Mission evaluation and follow-up”, aimed at documenting the follow-up activities carried out after the three international missions organized, both by cluster partners and participants from companies and RTOs, and assessing the successful implementation of the missions.

From a general perspective, after all the missions the participating entities engaged in follow-up activities with the stakeholders contacted in the three countries (USA, Canada and Japan), with the aim of exchanging strategic information and assessing opportunities for future collaboration.

The missions were mostly exploratory in nature and less business-oriented than initially planned, due to constraints related with local partners engaged, so the main aim was to open the doors to these markets and create local connections that the participating SMEs and RTOs could subsequently exploit. Signing Memorandums of Understanding was also a clear objective set for each mission, but in this respect too the partnership encountered some constraints and challenges that proved difficult to overcome, especially for the Japanese market.

Nevertheless, the overall assessment of the three missions is still very positive and important contacts were established in each country with future collaborations expected to happen, such as cooperation projects and business agreements. The ADMANTEX2i clusters will seek to keep ongoing exchanges with the international stakeholders engaged and carry out a long-term cooperation strategy for each international market to exploit further opportunities and strengthen outcomes and impact of the missions.

The organization of the international missions provided very relevant experiences to all the organizations involved and to partner clusters, as well as insightful lessons, best practices and learnings to be taken into account in future internationalization actions to be developed.