INNOVATE UK GLOBAL CORE PROGRAMME: PROCESS EVALUATION

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frontier economics

Executive Summary

This report presents the findings of a process evaluation of the Innovate UK Global core funded programme.

Aim and scope of the evaluation
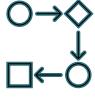
The evaluation sought to review the implementation and delivery of the Innovate UK Global core funded programme, identifying where processes are currently working well, and where there is room for improvement. Recommendations for process improvements going forwards have been drawn out where appropriate.

The evaluation has explored the design and delivery processes for the individual products funded with the core budget, as well as for the programme as a whole. The individual products included in the scope of the evaluation were:

■ Global Scoping Workshops (GSW) and Global Expert Missions (GEM)

■ Global Business Innovation Programme (GBIP)

■ Global Incubator Programme (GIP)

■ Bilateral CR&D competitions

■ Eureka programmes (specifically Eureka Eurostars, GlobalStars, Clusters and Networks)

■ Global Explorers

Evaluation approach

The evaluation explored four overarching thematic questions:

	Strategic prioritisation	To what extent, and how effectively, have processes ensured the right interventions are delivered in support of key objectives?
	Intervention delivery	To what extent, and how effectively, have the Global core programme of interventions been delivered as intended?
	Governance and coordination	To what extent, and how effectively, have governance and coordination processes supported delivery?
	Engaging stakeholders	To what extent, and how effectively, have processes involved stakeholders with the Global core programme?

Within each of these a range of aspects and sub-questions were explored.

The evaluation drew on a range of data sources, including: programme monitoring data; qualitative insights from key stakeholder groups; and survey data from product participants

and beneficiaries. The evidence generated was synthesised using framework analysis. This allows the consistency and strength of evidence to be taken into account before conclusions are drawn.
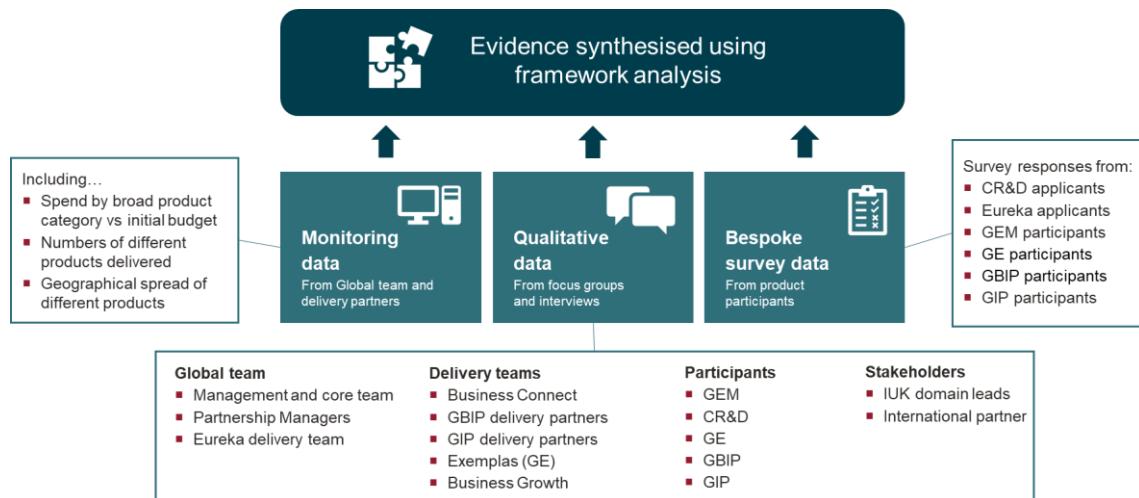
Key findings

🌐 Strategic prioritisation

The **geographies and sectors in which Global products were deployed are typically reported to be prioritised effectively** within known limitations.

There is **some appetite for more standardisation and transparency**. It was believed that this would: increase accountability, increase understanding among stakeholders, and improve the institutional memory of the Global team.

Intervention delivery

GSW and GEM are viewed as well designed, and the **majority of GEM participants were broadly satisfied with delivery**. There were some suggested delivery improvements including: engaging sector experts more in programme and agenda planning, giving more advanced sight of agendas, and building more informal networking opportunities into in-country visits. **GEM reports were typically found to be accurate** reflections of the learnings, but many stakeholders thought there should be **more dissemination** of the findings.

The majority of businesses are positive about GBIP delivery, but those that had been on more than one GBIP highlighted that **delivery quality varies across GBIPs**. All stakeholder groups stressed the need for more standardised guidance on: the roles and responsibilities of different stakeholders, expectations on product delivery, and an understanding of best practice. Common areas for improvement included suggested by businesses include: giving earlier sight of the visit programme, and limiting events that take up a large proportion of the visit time

in case these are low value to participants. Delivery partners highlighted **one challenge with GBIPs is recruiting sufficient high quality new applicants**.

Business participants are **typically positive about their experiences of GIPs**, with the majority satisfied with their market visits, online training and the amount of time spent working with the incubator. However, as with GBIPs, **delivery quality varied across GIPs**, and there are calls for standardised guidance. Delivery partners highlighted **GIPs also face challenges in recruiting sufficient high quality new business applicants** (similar to GBIPs).

Global Explorers is seen by businesses as an attractive product in principle. However, **satisfaction with the application process is lower than with other Global products**. Feedback highlighted challenges with the format of the application, its inflexibility, the lack of clear guidance, poor communication, and slow decision making. **Businesses have also found the claims process to be disproportionate** – perceiving it to be unnecessarily exacting, complex and slow. The Global team are already discussing process improvements with the delivery partner, and the application process has been paused since July 2024.

The **majority of business were positive about CR&D and Eureka programme processes**. There was some dissatisfaction from businesses about the lack of alignment of application processes and decisions making with international partners. However, this is not something that is within the control of the Global team.

Governance and coordination

There is some **variation in product experience and quality that was thought to arise in part from a lack of governance and oversight**. There is currently a lack of clarity about different partner roles, a lack of clear guidance about expectations and best practice, and limited monitoring of product delivery.

Products have sometimes interacted and worked together to support strategic objectives. However, there is a **lack of systematic evidence** on where this is intended or has been achieved. All delivery partners indicated that **more could be done to increase interaction and understanding between teams to ensure products are designed in a way to maximise value**.

There is ongoing learning by some Global delivery teams. However, **some opportunities for improvement that have been previously identified have not yet been enacted**. Furthermore, **some opportunities for learning exist but are not currently being exploited**.

Engaging stakeholders

Domain leads are positive about their engagement with the Global team. Several stakeholders thought that the Global team could leverage engagement with Innovate UK more strongly, to promote the Global programme and advertise its products.

Engagement with government departments is mixed. Stakeholders reported that engagement with some departments (such as the Department for Business and Trade (DBT)) was good, with additional ad hoc products being commissioned (including examples from the Department for Science, Innovation and Technology (DSIT) and the Department for Transport (DfT)), but that on the whole engagement with central government was too reactive.

There is **varying awareness of Global products among businesses**, with CR&D opportunities generally being the most recognised. Delivery partners and Global team members highlighted a need to expand methods for recruiting to GBIPs and GIPs. Communications with businesses could also benefit from being clearer and more consistent to ensure appropriate understanding of the scope of and objectives of Global products.

Recommendations[1]

The findings above indicate that overall, the Global team delivery processes, and those of delivery partners, work well. There is satisfaction from stakeholders, including supported businesses. However, there some common themes on areas for improvement.

One such area is **greater transparency and information sharing around strategic objectives and decisions**. Three recommendations are made:

Recommendation 1: The Global team should produce overarching "Country Plan" for each country of interest. These should be evidence based and set out: the objectives for engagement with that country, the relevant context (including any constraints faced), and the planned products and timing of those products. These plans could be shared within the Global team and other stakeholders as appropriate, to increase institutional memory and wider understanding of the Global team objectives. The plans should be updated as necessary over time – for example, if planned products or contextual factors change.

Recommendation 2: The Global team should produce a record of key decisions made – such as when a particular instance of a product is decided on. This should record standard information, such as the key motivations and relevant decision factors. Producing such records after decisions are made (rather than as part of the approvals process) is a pragmatic approach that seeks to maintain flexibility and speed of decision making, while still increasing transparency, institutional memory and accountability.

Recommendation 3: The Global team should work with delivery partners to increase the flow of information on the context around products. This could include:

- sharing strategic plans (that set out the context and objectives for planned products);
- holding product initiation meetings with stakeholders to provide the context for products;

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[1] Note recommendations presented here are summarised and categorised by theme, so do not appear in the same sequential order in the findings chapters of the report. However, they are numbered consistently throughout the report.

- proactively highlighting where products are intended to work together to support a particular aim; and
- sharing feedback with delivery partners on the learnings from products delivered and how these have (or have not) been used to inform other product decisions.

Another key area highlighted was around **reducing the variability of product experience**. Two recommendations are made with respect to this:

Recommendation 4: The Global team should produce, for all Global products, standardised guidance on the scope and objectives, the roles and responsibilities of different stakeholders within delivery, and Global team expectations for product delivery and outcomes. This should be shared and agreed with delivery partners to ensure awareness and understanding. This guidance could include recommendations on delivery processes and best practice.

Recommendation 5: The Global team should take a more active role in monitoring product delivery to increase accountability and help ensure product quality. This could include monitoring application rates, systemically collecting end-of-product delivery reports (with lessons learned) from delivery partners, and organising knowledge sharing sessions with delivery partners to facilitate sharing of knowledge and best practice.

There are also some recommendations made around **raising awareness and engagement among stakeholders**. Specifically:

Recommendation 6: The Global team should disseminate the findings of GEMs more widely and persistently. This could include promoting to relevant industry groups and government stakeholders, both when a GEM report is published, and when current events or inquiries make it relevant. The repository of GEM reports should be better advertised, both within Innovate UK and externally. For example, relevant GEM reports could be signposted alongside other product opportunities.

Recommendation 7: The Global team should establish regular meetings with relevant government departments on a consistent basis to update on the planned Global programme and build connections. Relevant government stakeholders should be invited on GEMs and GBIPs where possible and appropriate, to build a depth of understanding of the products offered and impacts of these.

Recommendation 8: The Global team and product delivery partners should agree red-amber-green lead-in-times for delivering ad-hoc products that can be clearly communicated to external stakeholders. This would help manage expectations and ensure product quality.

There are also a further six recommendations that are made that are specific to individual products.

Recommendation 9: There are small improvements that could be made to GEM delivery processes (or that could be implemented in a more standard way across GEMs), including:

- More consistently utilising Domain Lead knowledge and expertise to inform the recruitment of GSW and GEM participants.
- Engaging sector experts more in programme and agenda planning, giving more advanced sight of agendas, and building more informal networking opportunities into in-country visits.
- Using recording and transcription technology to streamline note-taking processes.

Recommendation 10: The Global team should work with delivery partners to expand recruitment methods for GBIPs and GIPs. This could include greater promotion of these products via the Innovate UK website and contacts lists, linking information about GBIPs/GIPs to relevant CR&D competitions, or greater marketing of opportunities through industry groups or local growth hubs outside the current Business Growth network.

Recommendation 11: There are some small improvements that could be made by delivery partners (or implemented in a more standard way) across GBIPs and GIPs, including:

- Providing clearer information on the scope and objectives of the products (and activities).
- Providing information earlier on cohort participants and market visit agendas.
- Tailoring preparation workshop content to experience level and including interactive content.
- Limiting the inclusion of long-duration events on visit agendas, and maximising industry and investor networking opportunities.
- Using strategic development plans more consistently throughout the programme.
- Increasing opportunities for peer-to-peer networking and learning within and across cohorts.

Recommendation 12: The Global team should work with the Global Explorers delivery partner to ensure that application processes have been clarified and sped up. This includes: switching to an online application; clarifying roles and responsibilities (e.g. who has authority and responsibility for answering enquiries); and determining appropriate communications and strategies that can implemented if applications are greater than anticipated.

Recommendation 13: The Global team should agree with the Global Explorers delivery partner a simplified claims procedure that is more proportionate for the size of the programme and claims being made by businesses. This could include automatic authorisation of claims within certain thresholds or certain types of expenditure, on production of valid receipts. The requirements for multiple quotes or for sight of bank records should be dropped.

Recommendation 14: The Global central team should provide support to the partnership managers to navigate the approvals gateway process and set up CR&D competitions. This would increase efficiency and free up partnership manager time.

It is suggested that the Global team review these recommendations, and internally agree any planned actions with associated timeframes. This will help ensure that learnings feed through into desired actions in a timely way.

1   Introduction

The Innovate UK Global team were allocated a core budget of £95.5m over the period 2022/23 to 2024/25, to fund innovation and business support programmes that enable businesses' international engagement. Prior to this, the Global team had only a small core budget allocation and the bulk of international programmes delivered by Innovate UK were funded through alternative funding sources.

Innovate UK commissioned Frontier Economics to conduct a process evaluation to evaluate the processes and procedures used to deliver the expanded Global core funded programme and the individual 'products' which are funded using the core budget. The products included in the scope of the evaluation are:

■ Global Scoping Workshops (GSW) and Global Expert Missions (GEM)

■ Global Business Innovation Programme (GBIP)

■ Global Incubator Programme (GIP)

■ Bilateral CR&D competitions

■ Eureka programmes (specifically Eureka Eurostars, GlobalStars, Clusters and Networks)

■ Global Explorers

The evaluation sought to review the implementation and deliver of the Innovate UK Global core funded programme, identifying where processes are currently working well, and where there is room for improvement. Recommendations for process improvements going forwards are drawn out where appropriate.

This report sets out the findings of that process evaluation.

■ Chapter 2 describes the evaluation approach. This includes setting out the evaluation themes and questions that are explored, and the data and approaches used to answer those questions.

■ Chapters 3 to 6 present the key findings for the four themes of the evaluation. These are:
  □ Theme 1: Strategic prioritisation. To what extent, and how effectively, have processes ensured the right objectives are delivered in support of key objectives?
  □ Theme 2: Intervention delivery. To what extent, and how effectively, have the Global core programme of interventions been delivered as intended?
  □ Theme 3: Governance and coordination. To what extent, and how effectively, have governance and coordination processes supported delivery?
  □ Theme 4: Engaging stakeholders: To what extent, and how effectively, have processes involved stakeholders with the Global core programme?

■ Chapter 7 concludes by summarising the recommendations for process improvements.

■ Annex A provides an overview of the Global core funded programme. This includes: a description of each of the products funded through the Global core budget; an overview of the programme organisational and delivery structure; and process maps for each product that set out the processes involved in planning, delivering and supporting the interventions delivered.

2   Evaluation Approach
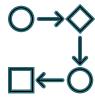
The process evaluation was delivered following the approach set out in an agreed evaluation framework.[2] This Chapter summarises briefly the evaluation questions that the evaluation sought to answer, and the data and approaches used to answer those questions.

2.1   Evaluation questions

Evaluation questions are used to articulate what the process evaluation seeks to answer.

This evaluation is structured around four overarching thematic questions, which cut across both the Global programme as a whole and individual products. The four thematic questions and supporting evaluation questions are set out in Figure 1.

Figure 1 Evaluation questions

Strategic prioritisation

To what extent, and how effectively, have processes ensured the right interventions are delivered in support of key objectives?

- ☐ How effectively are geographies and sectors for collaboration selected and prioritised?
- ☐ To what extent are the Global team responsive to changes and updates in government policy?

Intervention delivery

To what extent, and how effectively, have the Global core programme of interventions been delivered as intended?

- ☐ How effective are the design and discovery phases of products?
- ☐ How well are application processes run? How does the application process affect delivery?
- ☐ How effective are support and monitoring processes? How does monitoring affect delivery?
- ☐ How effective are reporting and dissemination processes at ensuring learning from interventions?

Governance and coordination

To what extent, and how effectively, have governance and coordination processes supported delivery?

- ☐ How effective are processes in ensuring that learnings from delivery or previous evaluations are reflected in Global programme processes?

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[2] The evaluation framework was developed through: a desk review of relevant programme materials, an audit of available data, and a focus group and seven in-depth interviews with members of the Innovate UK Global team and Business Connect delivery teams. The draft framework was then validated through discussion with the Global team and Innovate UK evaluation experts.

	☐ How does the Global team coordinate across products to exploit synergies in programme delivery?
	☐ How are risks identified and mitigated at the Programme and product level and are these processes effective?
	☐ How effective are processes for engaging with delivery partners?
	☐ How effective are processes for engaging with international partners?
Engaging stakeholders	**To what extent, and how effectively, have processes involved stakeholders with the Global core programme?**
	☐ How effective have processes been at facilitating collaboration and communication with other teams in Innovate UK?
	☐ How effective have processes been at communicating the Global offer to external stakeholders (incl. UK government and businesses)?

Source: Frontier Economics

2.2 Data sources

There are three sources of data that are used to answer the evaluation questions:

- Monitoring data from the Global team and delivery partners;
- Qualitative data from interviews and focus groups with key stakeholders; and
- Primary survey data from participants and beneficiaries of Global products.

These are summarised in Figure 2 and described in more detail below.

The evidence is synthesised using framework analysis. This involves developing an analytical framework, structured around the evaluation questions to organise findings. Qualitative and quantitative evidence is indexed against the framework, synthesised and interpreted. Where evidence points in different directions, it is assessed whether there are any clear reasons for this – for example, different perspectives from different types of respondents. The consistency and strength of evidence is taken into account before drawing conclusions.

Figure 2 Overview of data sources used
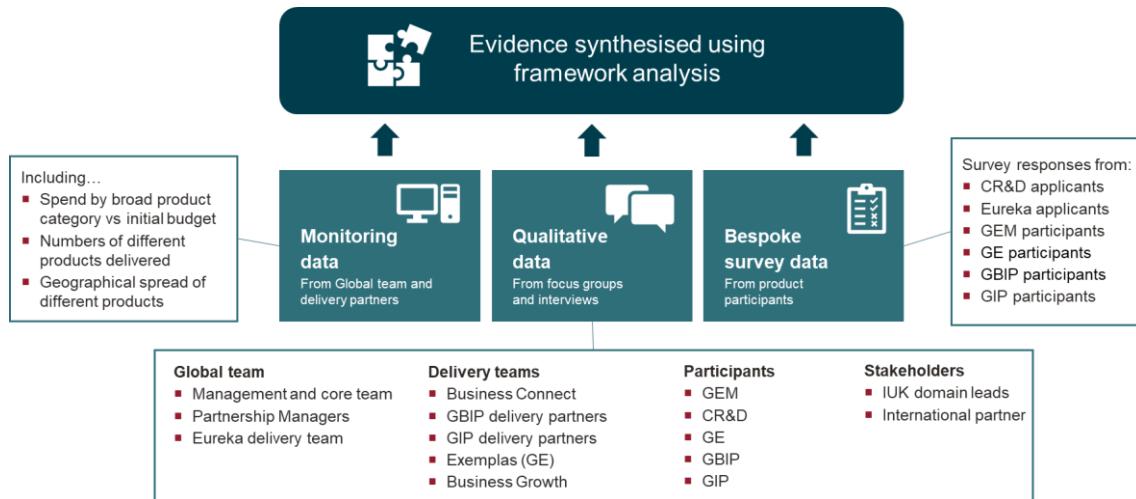
Source: Frontier Economics

2.2.1 Monitoring data

Innovate UK has provided several different pieces of monitoring data to support the evaluation. These have been used to provide context – for example, the number of instances of each product delivered. They have also provided the contact details required to reach out to programme participants and beneficiaries. Table 1 outlines the exact data used.

Table 1   Overview of monitoring data used

Spreadsheet	Description
Global-data_Secondary-participants (3)	List of GBIP and GIP participants; some Global Explorers projects; a small number of CR&D participants; and GEM missions. Includes some detail on programmes (e.g. location, commitment year) and, where relevant, participants.
Global Explorers Data 050724	List of Global Explorer projects and participants, with detail including geography and commitment year.
Global-data_Project-tags	List of GBIP, GIP, GEM programmes and Global Explorers, CR&D and Eureka projects. Includes some detail on project / programme, e.g. overarching competition (where relevant) and geography.

Spreadsheet	Description
Global Project and Participant Info	List of successful CR&D and Eureka applicants. Includes details such as competition name, commitment year, offer cost.
CTASK0114671-RITM0110881 - process evaluation project of programmes delivered through the GC budget	List of successful and unsuccessful CR&D and Eureka applicants. Includes details such as competition name, commitment year, application status, etc.

Source: *Frontier Economics, based on data provided by Innovate UK*
Note: *[Insert Notes]*

2.2.2 Primary qualitative fieldwork

The evaluation incorporated qualitative research methods to explore the lived experiences of senior stakeholders, delivery organisations, and Global participants and beneficiaries.

Qualitative research allows the evaluation to explore experiences in detail, examining not 'how many' had a particular experience, but what informed that experience and what programme processes(s) led to this. In-depth interviews allow the evaluation to explore experiences in a setting where people may feel more comfortable providing potentially sensitive information about their organisation or their experience. Focus groups allow participants to share and compare their experiences, allowing discussion around why their experiences may have led to similar or different outcomes, and in some instances achieving consensus on particular topics and themes.

A summary of the different stakeholder groups and how they were engaged is provided in Table 2.

Table 2 Qualitative fieldwork sessions

Stakeholder type	Fieldwork type
Global Management Team	Group interview (5 participants)
Global Team Relationship Managers	Group interview (6 participants)
IUK Domain Leads	Group interview (4 participants)
Internation Counterparts	Depth interview (1 participant)
GSW/GEM Business Connect delivery team	Focus Group (7 participants)
GBIP delivery partners	Focus Group (8 participants)

GIP delivery partners	Focus Group (8 participants)
Eureka Global Team	Depth interview (1 participant)
GEP Exemplas Delivery Team	Group interview (2 participants)
IUK Business Growth Team	Depth interview (1 participant)
GEM participants	Focus Group (13 participants)
GBIP participants	Focus Group (6 participants)
GIP participants	Focus Group (4 participants)
CR&D beneficiaries	Focus Group (11 participants)
GEP beneficiaries	Focus Group (7 participants)

Participants were recruited via email with the assurance of the research being voluntary and confidential. The interviews and focus groups took place online via Teams and were moderated by members of the evaluation team. Focus groups lasted for 60 minutes, while in-depth interviews lasted 30-60 minutes. Pre-agreed discussion guides were used to conduct the interviews and focus groups. The discussion guides provided details of key questions, but were used flexibly to ensure participants' experiences were fully explored.

Interviews and focus groups were recorded and transcribed with participant permission. A thematic framework approach was used for analysis, using a deductive approach, starting with the research questions and objectives and identifying themes based on the topics covered in the interviews. Each interview and focus group was included as a standalone 'line' of the framework, with themes under each strategic priority as 'columns'. This allowed the research team to explore and synthesise views and experiences across stakeholders and stakeholder types both at a programme level, and at an individual product level. Areas of commonality and difference were identified, and the evidence from different perspectives triangulated to explore the driving factors of these. Where quotations are included these are used to highlight the experiences of respondents, or further explain specific nuances of different experiences.

It is worth noting that interviews and focus groups (particularly with programme beneficiaries) are recruited on an 'opt-in' basis. In some instances this may mean people who take part have particularly strong views (either positive or negative) which they wish to convey, and as such they may not be representative of all.

Due to the more flexible and variable nature of qualitative discussions (when compared with quantitative surveys), when describing qualitative findings it is not appropriate to quantify these in terms of a proportion of respondents, as would be typical in quantitative research. However, the report uses a range of terms to give the reader an indication of the scale of an experience or feeling or belief expressed, for example 'most' would refer to a sizeable majority of respondents, 'many' would refer to a mid-high proportion of respondents, 'some' would refer to at least a small amount to around half of respondents, and 'a few' would refer to a very small minority of respondents.

2.2.3 Primary survey

For this evaluation several unique short online surveys were conducted, delivered to participants of Global core programme products (GEM, CR&D, Eureka, Global Explorers, GBIP and GIP). Table 3 provides an overview of the survey data captured for each product.

Not all responses received were considered usable. A small number of respondents indicated they were not answering based on personal participation in a relevant product (2 responses), or that they took part in a programme that was not in scope (CR&D programmes that were not funded by the Global team - 4 responses).

The achieved usable response rates varied from 9% for CR&D applicants to 38% for Global Explorers. These are similar response rates to other voluntary business surveys of this type. The lower response rate for CR&D and Eureka (than for other products) was expected because those surveys were sent to all applicants, not just those who were successful in their application for funding.

Table 3 Overview of survey data for each product

	Total responses received	Usable responses received**	Response rate (useable)	Description of survey respondents
GEM	36	36	33%	GEM participants
CR&D	87	83	9%	Both successful and unsuccessful CR&D applicants
Eureka	17	17	15%	Both successful and unsuccessful Eureka applicants
Global Explorers	50	50	38%	Successful Global Explorers participants
GBIP	97	96	15%	Successful GBIP participants* (except 4 unsuccessful applicants)
GIP	41	40	19%	Successful GIP participants

Source: *Frontier Economics*

Note: ** While the contact information provided by the Global team was understood to be for GBIP participants only, four survey respondents noted they were not actually successful in their application to participate on a GBIP. Their survey responses are still analysed where relevant. ** Responses are not considered usable if a respondents noted that they did not take part in the programme themselves or if they responded about participation in a programme that was not funded by the Global team.*

3   Findings – Theme 1: Strategic prioritisation

The first theme of the evaluation centred on strategic prioritisation, with an overarching evaluation question: "To what extent, and how effectively, have processes ensured the right interventions are delivered in support of key objectives?"

Key findings:

The geographies and sectors in which Global products were deployed are typically viewed to be prioritised effectively within known limitations. This was supported by views from the Global team, Innovate UK domain leads, and businesses. The main constraint faced is the challenge of having to align with the budget availability and interests of international partners.

That said **there is some appetite for more standardisation and transparency from within the Global team** and other stakeholders. It was reported that this would: increase accountability, increase understanding among stakeholders, and improve the institutional memory of the Global team. This would in turn help to ensure prioritisation is effective on an ongoing basis.

The Global team appear **appropriately responsive to government requests for additional ad hoc interventions**. The delivery of these interventions may be improved by delivery partners having greater visibility of 'why' a product is being activated, and by commissioning parties having a greater understanding of the lead-in times required to deliver products well.

3.1   Prioritising geographies and sectors effectively

Senior stakeholders (particularly Partnership Managers) are confident that the Global products offer a thorough and varied toolkit which can be deployed effectively and tailored depending on the needs of the sector, business, and partner country.

Geographies and sectors are prioritised effectively within known limitations

The processes for prioritising and determining where Global products are delivered are not rigid. Despite this, all stakeholders typically believed that the geographies and sectors for collaboration were selected and prioritised effectively.

The Global team indicated that there were some limitations in the sectors and geographies they could target. This tended to be due to the intricacies of aligning budgets and areas of interest with international partners. However, within those constraints, the Global team believed interventions were well prioritised.[3]

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[3] The effect of these constraints on the ability of the Global team to deliver interventions in line with their strategic objectives, and therefore achieve the outcomes and impact desired from the Global programme, is something that should be explored further through an impact evaluation.

> *"You're always having to tailor the products you use to the market depending on the innovation system, to an extent and how it works within that innovation system. CR&D is the one where we probably have to think about that the most because not all partners in countries will be able to do that, budgets can be an issue. So, you're having to factor all those things in. But by large we can use all of the products in all the countries, but there's just a few exceptions where it's more difficult."* Global Management Team Member
>
> *"I have seen value in all of the places that the GBIPs have been to in terms of the UK's Corporation and bilateral relationships and also what we have been able to deliver. So, working out where we visit and under what sectors or what headings we're making those visits for seems to have played out well. If you're looking at process, how did we get to that point where we decided 'we're going to do something in quantum in this country', personally, I haven't been part of, but the end result has been good."* - Global Management Team Member

Similarly, businesses that had participated in Global products were mostly positive that the products they engaged with were in the most effective places and sectors for them. This was true of both focus group participants and those who responded to the survey. However, it should be noted that businesses who had not applied for Global products were not engaged for this research and may have alternative preferences and priorities.

Table 1 summaries the survey data from businesses engaged with GBIP, GIP and CR&D products. The vast majority of respondents believed the product they engaged with was focused on the most strategically important sector for them. For CR&D respondents, this was true for participants of both open-sector competitions (which are most common) and sector-specific competitions, indicating both approaches are working well.[4]

For country, the picture is a little more varied (this is logical, as it probably makes less sense for businesses to participate in an offering outside of their desired sector, than it would to participate than in an offering outside their desired geographical area). The majority of GIP and GBIP respondents reported that the relevant country was the most strategically important for them, but only a minority of CR&D respondents did. However, this result should be interpreted with some caution, due to a survey error limiting the CR&D sample size to 23.

Across all products, the USA was frequently cited as a more strategically important country than the one in which the product took place.[5] This preference can also be inferred to some extent from the geographical distribution of Global Explorers projects (where applicants have a choice over country), as compared to the geographical distribution of most other products. The comparison is shown in Table 5. However, it is acknowledged that different products serve different purposes, and that implementing some Global products in the USA is challenging

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[4] 85% of open-sector competitions and 90% of sector-specific competitions believed their competition was focused on the most strategically important sector for them. Type of competition was categorised based on the question "*Which funding competition did you apply for? If you have applied to more than one please choose the most recent competition you applied for*." N = 53 [open-sector competitions] and 21 [sector-specific competitions], which excludes any survey respondents who answered "*Don't know*", "*Prefer not to say*." The results for sector-specific competitions should be interpreted with some caution given the small sample size.

[5] Question – "*If no, what would have been a more strategically important country for your business?*"

(particularly given some relevant administration is conducted at a state rather than country level).

Table 4   Share of respondents who thought their product was in the most strategically important country and sector for them

	Country	Sector
GBIP	60%	91%
GIP	76%	84%
CR&D	30%*	87%

Source: Frontier Economics based on own survey data.

Note: Comparison of answers to the questions: "Was this [programme] focused on the most strategically important sector for your business?" and "Was this [programme] focused on the most strategically important country for your business?"

GBIP n = 94 [sector] and 81 [country]; GIP n = 37 [sector] and 34 [country]; CR&D n = 83 [sector] and 23 [country], which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

*The sample size for CR&D [country] is much lower than for [sector] due to a survey error that was corrected part way through the fieldwork period.

Table 5   Geographic distribution of products

Proportion of product delivered in:	CR&D	GBIP	GIP	GEM	Global Explorers
Europe	12%	22%	0%	14%	20%
Asia	31%	35%	24%	23%	12%
North America	38%	17%	62%	27%	51%
India	8%	11%	3%	9%	3%
Australasia	4%	11%	10%	23%	3%
Other	8%	4%	0%	5%	11%

Source: Frontier Economics based on spreadsheets "Global Explorers Data 050724" (Global Explorers) and "Global-data_Project-tags" provided by Innovate UK.

Note: Geographic distribution of Eureka competitions is not provided, given projects consortiums can involve multiple countries. Geography is also not decided by Innovate UK in the same manner as the other products, and by definition the majority of competitions will be Europe-based. All 131 Global Explorer projects implemented during the core budget allocation period are included. Dates are not provided in the Global-data_Project-tags spreadsheet, but this is assumed to cover the same core budget allocation period. Figures for CR&D, GBIP, GIP and GEM are based on projects / competitions, not participants.

The Innovate UK domain team were satisfied that they have been involved in prioritisation and decision-making process where appropriate. They considered the Global Team to have been

successful in maintaining an understanding of the wider sector landscapes and needs, rather than only being responsive to big announcements and updates.

> *"I think they're quite good at responding to bilateral policies that possibly aren't big flashing updates but are very relevant to how the UK partners with different countries around the world. I think the Global Team is really good at keeping an eye on that landscape and coming up with new priority areas and intervention types based off of that."* - Domain Lead

However, one issue thought to be a challenge to ensuring appropriate strategic prioritisation was changing personnel in the Innovate UK domain teams. This was reported by the Global team to sometimes lead to interest levels and priorities changing, with challenges for planned products if there is not sufficient buy-in. This has been addressed already to some extent by requiring wider sign-off from Innovate UK domain teams (rather than a single domain lead) that a proposed product is considered valuable.

There is appetite for more transparency and reporting around strategic decisions

The Global Management Team and Partnership Managers reported that this effective prioritisation had been enabled by the Global Team having a clear overarching 3-year plan to guide activities, but still having some flexibility to adjust and respond to emerging interests and requests where appropriate. This flexibility has allowed the programme manager to dynamically manage the resource, for example if a GBIP has been delayed or dropped, they can proactively find another opportunity where this would be beneficial.

> *"The degree of change and fluctuation along the way because commitments at the start of a three-year period 18-months later might not be the same in the domain teams, people change, people move job roles, priorities shift. So had we had that allocation locked in at the very beginning of the spending review period, and we weren't able to change it, which is sometimes the case, if you have a managed programme, it's hard to change things, we may well have delivered 60% of the GBIPs we could have."* - Global Management Team Member

However, while overall the lack of a rigid standardised processes was seen as beneficial by stakeholders and partners to support the flexibility and responsiveness of the programme, there was some appetite for more transparency and standardisation of processes. There were two main reasons given by Global team members and other stakeholders:

■ To facilitate institutional memory of why decisions were taken. This would enable new colleagues to be brought up to speed more quickly and provide security against key personnel leaving. Global team members identified one challenge to ensuring continued effective strategic prioritisation being that those entering roles would often not have full sight of what interventions had been delivered, where, and why.

> *"I think having information written down, a bit more awareness across government and across the team would be really helpful. I'm sure everybody knows a lot about their areas and domains. A lot is kept in people's heads or so I've found."* – Partnership Manager

■ To increase understanding of, and potentially accountability for, decisions made.

"I haven't ever seen why certain countries are prioritised, only that they have been. Perhaps this is me not exploring very in depth, this might not be a fault to the Global Team, but it'd be good to understand why those countries have been prioritised or technology areas have been prioritised by the Global Team as well." - Domain Lead

"You need some rigour around it. You know you can't just go off and do everything you want to do, so there needs to be a balance. But I think you need the flexibility to be able to respond quite quickly to opportunities." - Global Management Team Member

"It would be good for me to have some governance around that which I don't think would change anything about the way we do things on the ground, but it would, as I say, draw some circles and lines around it so that it's a bit more visible and accountable." - Global Management Team Member

"Do [those decisions] need to be written down somewhere for an audit trail? Maybe." – Global Management Team Member

Along similar lines, there was also a desire from Partnership Managers to have sight of an 'country plan' providing the overarching strategy and objectives for a country. They thought this document could then be used to ensure buy-in, particularly at more senior levels.

"We started very much from a blank piece of paper. We worked with our analysis and Insights team to get some dates and some evidence together in terms of what that team thought the best sectors would be to collaborate around. It's probably something we probably don't do all that much once it gets going. Although some of the sector teams have commissioned some work themselves, to identify which countries they think we should be collaborating with from their perspectives." – Partnership Manager

Based on these findings, two related recommendations are made:

> **Recommendation 1**: The Global team should produce an overarching "Country Plan" for each country of interest. These should be evidence based and set out: the objectives for engagement with that country, the relevant context (including any constraints faced), and the planned products and timing of those products. These plans could be shared within the Global team and other Innovate UK colleagues, to increase institutional memory and wider understanding of the Global team objectives. The plans should be updated as necessary over time – for example, if planned products or contextual factors change.
>
> **Recommendation 2**: The Global team should produce a record of key decisions made – such as when a particular instance of a product is decided on. This should record standard information, such as the key motivations and relevant decision factors. Producing such records after decisions are made (rather than as part of the approvals process) is a pragmatic approach that seeks to maintain flexibility and speed of decision making, while still increasing transparency, institutional memory and accountability.

3.2   Responsiveness to government policy

The Global team is seen as responsive to government requests

The Global team were seen to have the flexibility to respond to ad-hoc 'policy-asks' from a range of sources, including government departments such as DSIT and DfT. For example, in some instances departments have sought additional GBIPs that they would fund themselves, and these have often been accommodated by the Global team accordingly.

> *"What has worked well is the fact that we have had longer term funding for our own budget to run our own programmes and I think we've delivered with success. I think because of that we often have people who are coming to us a lot of the time because they're seeing what we are doing."* - Partnership Manager

Global Management Team members noted that this works most effectively when they are included early in discussions, to help with expectations management to ensure they remain consistent with their objectives to deliver on behalf of business, rather than directly delivering government policy (while also balancing this with Government ambitions and targets).

> *"Our toolkit is quite mature in a way. We're also always looking at new tools that we can add. I think that's probably quite helpful in in being able to say, well, this is what we can do and this is what we can't do and having that clarity about our purpose is really helpful as well. We're there to support UK businesses to engage internationally, so if that's not what DSIT is turning to us to deliver on then we have to bring it back a bit or push back."* - Global Management Team Member

Team capacity was the main limitation to delivering ad-hoc government requests noted by the Global team. Similarly, delivery teams noted their ability to deliver these can be impacted by:

■ Not having sufficient visibility of the 'why' a product is being activated. Sometimes this was why a product was targeting the chosen sector, sometimes why the place was chosen, sometimes why the product type was chosen and sometimes a mix of these.

■ Not always having clear timelines for delivery, and a lack of understanding of the lead-in time needed to get things off the ground from the government and IUK Domain Leads.

This prompts a recommendation:[6]

Recommendation 8: The Global team and product delivery partners should agree red-amber-green lead-in-times for delivering ad-hoc products that can be clearly communicated to external stakeholders. This would help manage expectations and ensure product quality. Products would not be developed if the lead in time is in the red band (i.e. less than a minimum threshold). If the lead in time is in the orange band, then products could be designed but

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[6] Recommendations are numbered as per the ordering of recommendations in Chapter 7, where recommendations are summarised and categorised by theme. They are therefore not numbered sequentially through Chapters 3 to 6. However, they are numbered consistently throughout the report.

commissioning parties need to be aware that the limited time for development may impact on product quality. If the lead in time is greater than a threshold (i.e. green) then there would be no concerns about ad hoc delivery timescales.

4 Findings – Theme 2: Intervention delivery

The second theme of the evaluation centred on intervention delivery, with an overarching evaluation question: "To what extent, and how effectively, have the Global core programme of interventions been delivered as intended?" This question was explored for each of the 7 main Global funded products and the findings set out in the sections below in turn:

- Global Scoping Workshops (GSW) and Global Expert Missions (GEM)
- Global Business Innovation Programme (GBIP)
- Global Incubator Programme (GIP)
- Global Explorers
- Collaborative Research and Development (CR&D)
- Eureka programmes (specifically Eureka Eurostars, GlobalStars, Clusters and Networks)

4.1 GSW and GEMs

Key findings:

GSW and GEM are viewed as well designed, but **delivery partners would welcome greater sight of the context for the products they are delivering** and the impacts they have. They believe this would help them design products in a way that maximised their value.

The **majority of GEM participants were broadly satisfied with GEM delivery**. There were some suggested improvements, including: engaging sector experts more in programme and agenda planning, giving more advanced sight of agendas, and building more informal networking opportunities into in-country visits.

GEM reports were typically viewed as accurate reflections of the learnings from each GEM. However, stakeholders (including participants and Innovate UK domain teams) believed there **should be more dissemination of the findings**, as well as other follow-up actions (such as feedback to GEM participants about future activities arising that may offer opportunities for further engagement or collaboration, or to understand any follow-on work their insights had contributed to).

GSW and GEMs are typically viewed as well designed, but delivery partners would value greater sight of the context

There have been 20 GEMs delivered since April 2022.[7] The GSWs and GEMs delivered by Business Connect were seen as mostly successful by stakeholders and participants.

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[7] Based on data in "*Global-data_Secondary-participants (3)*" provided by Innovate UK, using "commitment year" to determine those which took place in financial year 20222023 onwards.

Participants welcomed the opportunity to find out more about other countries' approaches and cultural difference, and make new contacts.

It was noted by delivery leads that GEMs and GSWs work particularly well when there is good engagement from Domain Leads, country partners, experts, and when scope is well defined and communicated. Examples were highlighted of Business Connect making ongoing improvements to their processes to ensure systems were refined where needed. This includes the introduction of a project initiation form to help the team better understand the priorities driving GSWs and GEMs. Where possible they also try and ensure a meeting is held with different partners to ensure everyone has the same understanding of the objectives and to manage expectations accordingly.

> "I think [project initiation form] made the planning process a lot smoother for us and has also given us a much better idea of how something comes to be a strategic priority, because I think often those discussions take place before we're involved. So that just means we're really up to speed before we get the process running." - Business Connect Delivery Partner

Despite this, Business Connect would still value more sight of longer-term plans for different geographies, as well as more connectivity to other parts of the Global programme. This would enable them to see what happens after a GSW or GEM, to understand the wider impact and learning from the activities. This would enable them to design products in a way that maximise their value for the programme as a whole. Current access to dashboards gives them some understanding of what other delivery activity is being undertaken, but they do not always think this is linked to or has followed on from GSW or GEM activity. Business Connect have started to utilise the GEM and GSW reports to initiate discussions for where future activities might be focused, and would value further connectivity, buy-in, and support from Domain Leads and the Global Team in making these links.

Business Connect see their delivery processes for GEM as very streamlined as they deliver several of these a year and are highly familiar with their processes. GEM participants were also mostly positive about their experience of the programme, from being recruited, through to the visit and reporting process itself. Feedback from stakeholders is summarised below with respect to the different stages of the GEMs.

Participants were positive about GEM recruitment processes

Starting with the recruitment and briefing process, Business Connect reported that recruitment processes typically worked smoothly. They noted that sometimes identifying appropriate people to recruitment to a GEM or GSW could be challenging, but that this worked better when IUK domain leads were involved and able to inform selection.

Figure 3 highlights how almost all GEM survey respondents held positive views about the various different aspects of the recruitment and briefing process.

Figure 3 Views on recruitment and briefing process of GEMs
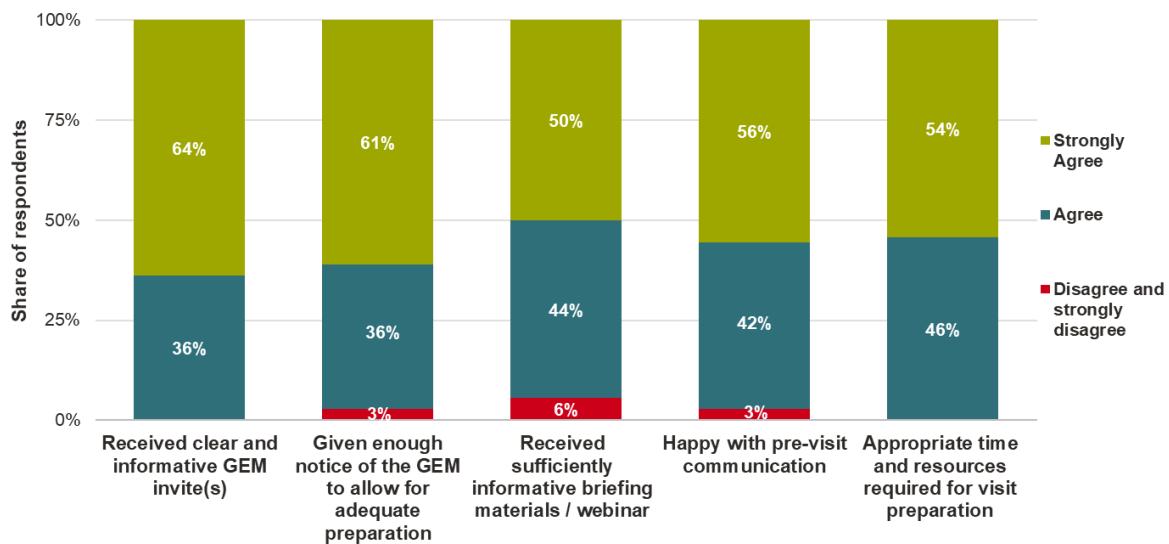
Source: Frontier Economics based on own survey data.

Note: Question = "With regard to the recruitment and briefing process for the GEM, how far do you agree or disagree with the following statements? Please chose one answer per statement."

Base = 35-36, which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

The area where there was some dissatisfaction was around the informativeness of the briefing materials. GEM survey respondents were asked an open-ended question about the recruitment and pre-visit process.[8] A recurrent ask among survey respondents was for clearer communication of the GEM missions and goals prior to the visit.

> "It was not clearly communicated what the goals of the mission. There should have been key questions that they wanted us to answer given to us ahead of the mission that would have helped us focus our attention." - GEM survey respondent

In addition, a particularly valued element was found to be having an in-person pre-visit meeting with the delegation. However, this did not take place consistently across GEMs, indicating a minor area for improvement.

Majority of participants were positive about the GEM visits but some areas for improvement were suggested

GEM survey respondents also were generally happy with the visit itself. The majority (83%) considered the visit length to be 'about right', with the rest considering it too short.[9] Figure 4 demonstrates there was high levels of satisfaction with various components of the visit. In

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[8] Question = "What did you find most helpful from the pre-GEM market visit briefing? What do you think could have been done better, or added on to the existing briefing?" Question = "Please provide any further comments you have on the GEM recruitment or pre-visit briefing process."

[9] Question = "Did you find the duration of the GEM market visit appropriate?" Base = 36.

particular, almost two thirds of respondents were very satisfied with visit management and organisation.

Figure 4   Satisfaction with the various components of GEM visit
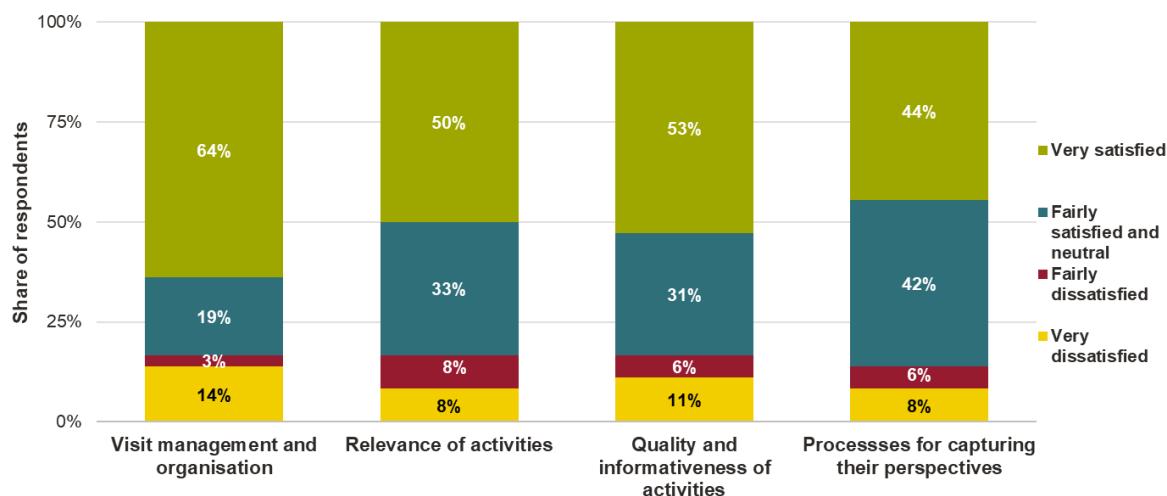
Source: Frontier Economics based on own survey data.

Note: Question = "With regard to your experience of the GEM visit, how satisfied were you with the following components? Please chose one answer per statement."

           Base = 36.

The focus group participants suggested that some improvements could be made to the visit agenda and planning. This included involving participants more in the programme and agenda planning, given that they are sector experts. Providing participants with earlier sight of the agendas was also suggested, so that they could prepare more in advance and potentially add in their own activities while on the visit. Finally, participants suggested building in more informal networking opportunities into visit agendas, as these were seen as particularly valuable but there was not always time in the formal schedule for these.

The report writing process and particularly the inclusion of a designated report writer on the visit were seen as a particular strength of the visit process by the focus group. It was viewed as an accurate and efficient way to capture expert opinions. However, one focus group participant suggested that participants all having to take detailed notes in meetings sometimes detracted from engagement, and that there could be better use of transcription technology to improve and streamline the note taking process.

GEM participants viewed the final reports as accurate, but several stakeholders suggested there should be further opportunities for dissemination and updates

Looking at survey data, all respondents viewed the final report as a very or fairly accurate description of the learnings from their market visit.[10]

Almost all survey respondents (91%) were very or fairly satisfied that the findings from the GEM were sufficiently disseminated to stakeholders.[11] Some focus group participants were less positive, however, noting that their dissemination event was not well attended. GEM attendees and Innovate UK domain leads reported being typically unaware of GEM findings outside the GEMs they had personally attended, and were unaware of where to find GEM reports. The successful dissemination of GEM findings, both within Innovate UK and externally, will be key to them having the desired impact, and therefore this should be explored further as part of any impact evaluation.

A key theme emerging from the qualitative survey evidence[12] is respondents' desire for more follow-up actions after the GEM visit. Suggestions included follow-up visits; follow-on collaboration opportunities; and feeding back to the GEM delegation if their insights led to any follow-on work. It is understood that it is not always possible for Innovate UK to plan follow-on products (e.g. a GBIP to follow a GEM) due to various factors, such as the international partner organisations' budget or priorities. However, this evidence suggests there is appetite for such follow-on offerings, where they are possible. There is also appetite for follow-on actions which are not tied to other global products and so may be less challenging to implement.

> *"The main problem with GEM is that it isn't joined up thinking: it doesn't seem to link up to any activities afterwards to move an agenda forward. It would be much better if it connected directly to funded follow-up activities that could involve the participants, to actually make something happen. Otherwise, it seems a little pointless."* - GEM respondent

Recommendations

In light of the above findings, the main recommendations concerning GEMs are

Recommendation 3: The Global team should work with Business Connect and other delivery partners to increase the flow of information on the context around GSW and GEMs. This could include: sharing strategic plans; proactively highlighting where products are intended to work

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[10] Question = "*Do you feel that the final report on your GEM was an accurate reflection of the learnings from your market visit?*" Base = 35, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*".

[11] Question = "*To what extent are you satisfied or dissatisfied that the findings from your GEM were sufficiently disseminated to stakeholders?*" Base = 34, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*".

[12] Questions = "*What elements of the GEM visit process did you think were most critical to delivering the mission, and how could the visit have been improved?*" and "*Do you have any other comments on the GEM you participated in, or any suggestions how the GEM could be improved?*"

together to support a particular aim; and sharing feedback with Business Connect on how GSW or GEM have (or have not) been used to inform future product decisions.

Recommendation 9: There are small improvements that could be made by Business Connect to GEM delivery processes (or that could be implemented in a more standard way across GEMs), including:

- More consistently utilising Domain Lead knowledge and expertise to inform the recruitment of GSW and GEM participants.
- Engaging sector experts more in programme and agenda planning, giving more advanced sight of agendas, and building more informal networking opportunities into in-country visits.
- Utilising recording and transcription technology to improve and streamline the note-taking process.

Recommendation 6: The Global team should disseminate the findings of GEMs more widely and persistently. This could include promoting to relevant industry groups and government stakeholders, both when a GEM report is published, and when current events or inquiries make it relevant. The repository of GEM reports should be better advertised, both within Innovate UK and externally. For example, relevant GEM reports could be signposted alongside other product opportunities.

4.2   GBIPs

Key findings:

Delivery partners highlighted **one challenge with GBIPs is recruiting sufficient high quality new applicants**. 17% of GBIP participant organisations have attended two or more GBIPs since April 2022, while 4% have attended 3 or more.

Businesses are positive about GBIP application processes, but **around one in seven report being disappointed with the GBIP market visit**. Common suggested areas for improvement included: giving earlier sight of the visit programme, and limiting events that take up a large proportion of the visit time in case these are low value to participants.

Stakeholders (particularly businesses that had been on more than one GBIP) highlighted that **delivery quality varied across GBIPs**. Various reasons for this are mentioned, but particularly emphasised by all stakeholders is the **need for standardised guidance** on the roles and responsibilities of different stakeholders in the delivery of GBIPs, expectations on product delivery, and an understanding of best practice.

The delivery approach for GBIPs was generally seen as successful among senior stakeholders, and the process for working with Business Growth streamlined. They also reported there was a positive perception of the nature of the product among external stakeholders (including the government and international partners).

"The process of engaging the businesses and planning for the visit and the activities that go on after the visit and before the visit, in my opinion, makes sense. So what we deliver to the customers makes sense the way we engage with the customers makes sense." - Global Management Team Member

Reflections of other stakeholders were more nuanced. This is summarised below, with reflections organised around the different stages of delivery.

One challenge identified was recruiting sufficient high-quality applicants to GBIPs

One of the main challenge delivery partners and stakeholders noted in the delivery of GBIPs was around recruitment – specifically, recruiting a sufficient number of high-quality applicants.

"It's been very difficult to recruit for because there haven't been enough applicants, whereas those applicants may have different needs or may be working in a different, slightly different variation of that sector." - GBIP Delivery Partner

"We sort of sense that the Business Growth(s), because they're separate businesses, are not always very good at connecting with each other....I think we've been a bit disappointed during the recruitment phases, for example, we don't think it's being spread out across the whole Business Growth and we're not getting huge numbers of applications." - Domain Lead

This has led to some businesses being accepted who were potentially less appropriate for the opportunity, resulting in cohorts with mixed levels of experience. These mixed cohorts may have been more challenging to design a cohesive programme for.

A large proportion of GBIP participants have attended multiple GBIPs. For example, analysis of monitoring data indicates that so far 17% of GBIP participant organisations have attended two or more GBIPs since April 2022, while 4% have attended 3 or more.[13] One survey respondent noted that "*it felt like some cohort members spent all their time on GBIPs.*"[14] This raises questions about the value for money for Innovate UK of supporting businesses on multiple GBIPs, rather than supporting new businesses. This should be explored further through any impact evaluation activity.

Delivery partners believed the challenges in recruitment linked to advertising for the programme overall and the reach of the partner databases. They also noted that current promotion using the Business Connect flyer takes a long time to organise. They thought more could be done to encourage a more central and strategic approach to recruitment, for example by encouraging Business Growth partners to share contacts and knowledge more

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[13] Calculated by identifying repeated company names in the spreadsheet "Global-data_Secondary-participants (3)" provided by Innovate UK (using the commitment year to determine those which took place in financial year 2022-23 onwards). This may be an underestimate, due to imperfect matching of company names. Some simple cleaning of names was conducted (e.g. to remove trailing blanks, and to ensure no difference in capitalisations), but differences in spelling would be counted as different organisations.

[14] Question = "*Please provide any further comments you have on the GBIP Programme, including any suggestions for improvements.*"

consistently, encouraging sector experts and Domain Leads to promote GBIPs to their contacts, and disseminating recruitment via IUK competition leads.

It was also sometimes noted that the timing of different GBIPs interacted and made recruitment more challenging if multiple GBIPs could appeal to a similar set of UK businesses.

"Every partner is divvied out their GBIPs, but there isn't a concerted effort to all communicate together and plan when we're going to run these things. So what you often find is…. you're left with overlapping of cohorts [in similar sectors]….So I think there has to be much more sort of looking at the bigger picture" - GBIP Delivery Partner

Applicants were positive about the GBIP application processes

Almost all GBIP survey respondents also held positive views about most of the GBIP application process components (shown in Figure 5). The only exception was that a sizeable minority (over one quarter) reported they did not receive help and guidance from Innovate UK. However, this could be because people did not request help, or did not perceive the help they received as coming from Innovate UK, rather than that they requested help or guidance and were dissatisfied with what was provided. Whilst qualitative feedback on the application process[15] was generally positive, a few survey respondents did note criticisms, particularly a lack of transparency over the selection criteria.

Figure 5   Views on the GBIP application process
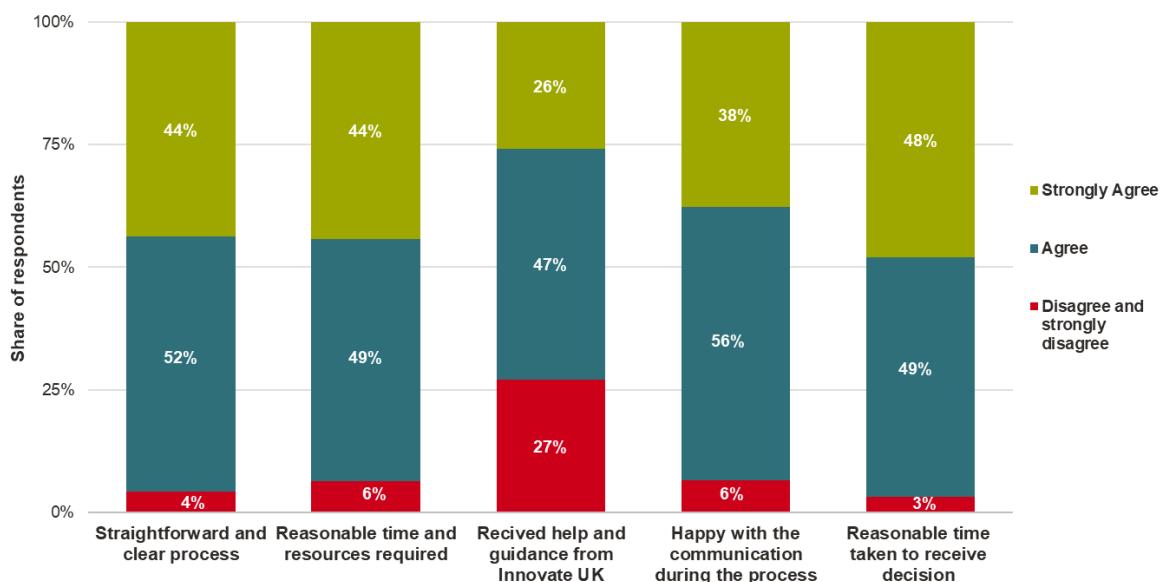
Source: Frontier Economics based on own survey data.

Note: Question = *"With regard to the GBIP application process, how far do you agree or disagree with the following statements? Please chose one answer per statement."*
Base = 85-96, which excludes any survey respondents who answered *"Don't know"* or *"Prefer not to say"*.

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[15] Question = "*Please provide any further comments you have on the GBIP application process, including any suggestions for improvement.*"

Most applicants were positive about the preparation stage, but some noted they lacked clarity around the purpose and scope of GBIPs

GBIP survey respondents were also generally positive about the GBIPs' Get Ready phase:

■ 80% found the strategic action plan devised with an IGS was somewhat or very useful.[16]

■ 90% found the pre-visit workshop was somewhat or very useful.[17]

■ 87% agreed or somewhat agreed that the quality and length of training and support activities received pre-visit were sufficient.[18]

However, in the free-text box questions[19] a few criticism and areas for improvement were noted by respondents. A notable insight is that there appears to be a discrepancy in views regarding the workshop content. Some would have preferred more market / sector-specific sessions over those focused on general skills (e.g. pitching). This is particularly the case for more mature businesses or those who had previously attended GBIPs. On the other hand, a few respondents noted how helpful they found some of these general sessions, indicating the difficulty in tailoring session content to cohorts with a range of experience levels.

> *"The prelim sessions were probably negatively valuable overall for my time, as I already knew very much what I needed to know, but do not take this as a criticism for the sessions in general as other participants clearly needed this kind of prelim info."* - GBIP survey respondent

While GBIP participants were positive about the application process and preparation workshops, most focus group participants revealed that they lacked clarity around the GBIP's purpose and scope which was only clarified for them after having attended a GBIP. As such, those who had attended more than one GBIP noted they found their second engagement to be more positive, as they were clearer about what to expect. Others thought they would feel more informed if they did a second GBIP.

> *"If I was to do a second one, I'd feel a lot more informed about what I was getting into than I did the first time around, which is almost a statement of the obvious. But it's the truth. I didn't really know what I was to expect the first time around, I just did it."* - GBIP Participant

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[16] Question = "*How useful did you find each of the following components in preparing you for your visit?*". Base = 85-91, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*" and 4 respondents who noted their GBIP application was unsuccessful.

[17] Ibid.

[18] Question = "*To what extent do you agree or disagree that the quality and length of training and support activities received pre-visit were sufficient?*" Base = 91, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*" and 4 respondents who noted their GBIP application was unsuccessful.

[19] Question = "*Please provide any further comments you have on the GBIP 'Get Ready' pre-visit phase, including any suggestions for improvements.*"

One particular aspect of scope around which there was confusion was whether the GBIP involved a trade mission. This suggested different parties had marketed GBIPs in slightly different ways.

The majority of attendees were satisfied with their GBIP visit with some small suggestions for improvements

Moving on to the GBIP market visit, Figure 6 indicates that overall survey respondents have fairly high satisfaction levels for most of the different components. However, there is a sizeable minority who expressed differing levels of dissatisfaction (around 1 in 7 participants, noting some variation across components).

Figure 6   Views on the GBIP market visit
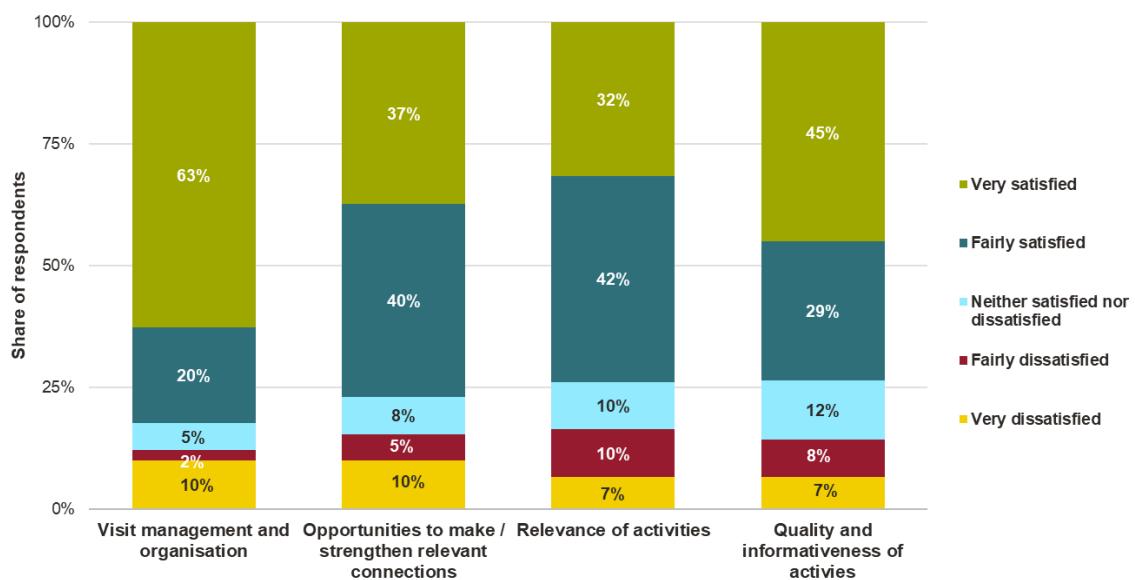
Source: *Frontier Economics based on own survey data.*

Note: *Question = "With regard to your experience of the GBIP market visit, how satisfied were you with the following components? Please chose one answer per statement."*

Base = 91-92, which excludes any survey respondents who answered "Don't know" or "Prefer not to say" and 3 respondents who noted their GBIP application was unsuccessful.

The qualitative survey responses[20] and the focus group revealed several insights about things that worked well or could be improved regarding the market visit. For example:

■   **Networking opportunities** (both with their own cohort and in-market contacts) were a particularly valued element of the GBIP market visit and overall programme. However, some respondents thought the selection of in-market contacts could be improved,

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[20] Questions = "*What elements of the GBIP market visit did you think were the most helpful for your business, and how could it be improved at any stage?"; "Is there anything else which could have helped you to maximise the benefit from the GBIP market visit?";* and *"What elements of the overall GBIP programme did you think were the most valuable to your business?"*

particularly to include more industry contacts and potential investors. Other suggested improvements include splitting the cohort into smaller groups (or even 1-1 meetings) for the networking activities and providing a list of potential contacts further in advance to allow for preparation.

> *"Probably most value to us was the broad exposure to different organisations innovating in this space and hearing the - typically for USA - open dialogue about ideas, opportunities, innovations and challenges."* - GBIP survey respondent

> *"It was quite University heavy. They were looking for partners of course but there was less engagement with Industry."* - GBIP survey respondent

■ A few survey respondents appreciated being able to **attend conferences** as part of the GBIP visit, although one noted the conference itself was below expectations. Some also believed that Innovate UK could have done more at the conference to leverage their brand (e.g. set up a booth at the conference) and support GBIP participants with meeting investors. Whilst the flexibility during conference attendance was appreciated, some thought this should have been communicated in advance to allow time to plan and prepare independent schedules. Other participants highlighted that events that take up a large proportion of the visit should be carefully considered before being included on the programme, as they risk wasting a lot of time if not relevant to some attendees.

The majority of participants were also positive about the post-visit phase, although this was a lower share than for other GBIP phases

Most GBIP survey respondents (around 80%) held a positive view about the usefulness of the post-visit phase workshop, engagement with an Innovate UK Business Connect Innovation and Growth specialist ['**IGS**'], and the strategic action plan (shown in Figure 7). However, a sizeable minority (around 20%) did not find these activities helped them to maximise the benefits of the market visit.

Interestingly only a very small minority (2%) were very or fairly dissatisfied with the amount and quality of their IGS's input / advice.[21] This could suggest that those who did not find 'the post-visit IGS engagement helped maximise the benefits of the market visit', thought such engagement was unnecessary, rather than that they were dissatisfied with the engagement itself.

Whilst GBIP survey respondents appear to have been satisfied with the post-visit support they did receive, a key insight from the qualitative survey evidence[22] is the desire for a longer period of structured post-visit support. Examples of suggested support ranged from follow-up visits

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[21] Question = "*How satisfied, if at all, have you been with the overall amount and quality of input or advice received from your Innovate UK Business Growth innovation and growth specialist?*" Base = 89, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*" and 3 respondents who noted their GBIP application was unsuccessful.

[22] Questions = "*Is there anything else which could have helped you to maximise the benefit from the GBIP market visit?*" and "*Please provide any further comments you have on the GBIP Programme, including any suggestions for improvements.*"

and additional local engagement to follow-on GIPs and CR&D funding opportunities. The latter suggestions are similar to the views of some GEM survey respondents, discussed in Section 4.1, and again indicate an appetite for follow-on products, where this is possible (noting it is a challenging task to accomplish).

Figure 7   Did the following components of the post-visit GBIP phase help maximise the benefits of the market visit?
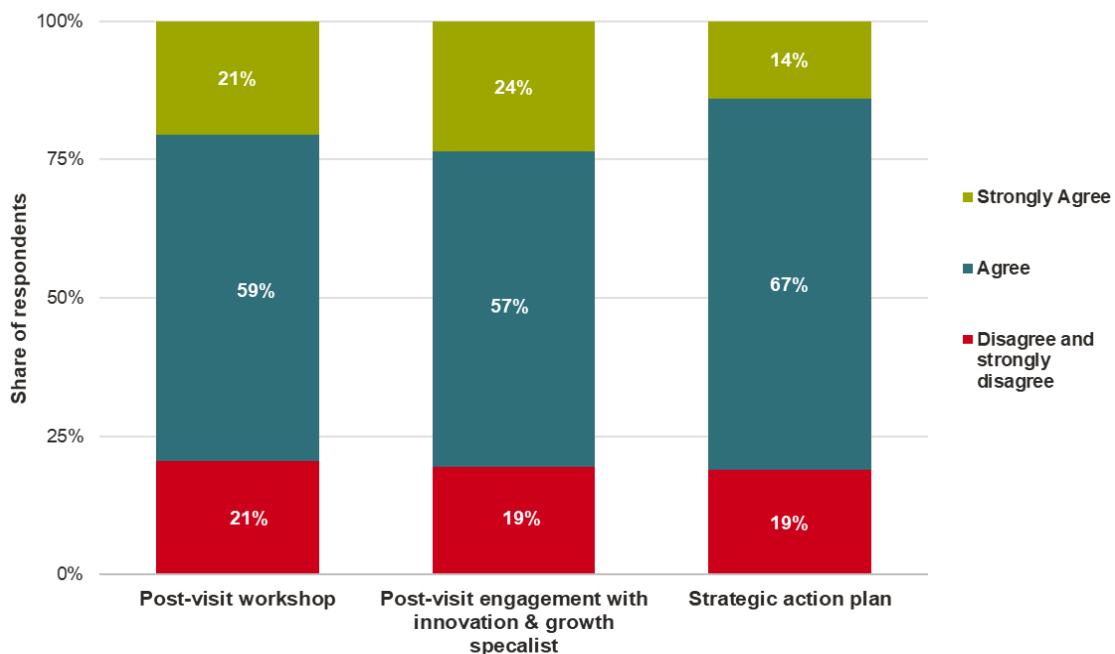
Source: *Frontier Economics based on own survey data.*

Note: *Question = "How far do you agree or disagree that the following components of the post-visit exploit the opportunity phase helped maximise the benefits of the GBIP market visit? Please chose one answer per component."*

    Base = 68-79 which excludes any survey respondents who answered "Don't know" or "Prefer not to say" and 3 respondents who noted their GBIP application was unsuccessful.

An overall key finding from the GBIP survey is that when asked about the most valuable element of the programme overall, the most common response was the opportunity to network and build connections within their GBIP cohort.[23][24] Suggestions to leverage this further included organising cohort meet-ups after the programme has concluded, or facilitating further networking and knowledge-sharing opportunities via cross-cohort workshops. This could include cohorts in similar sectors or countries, or even those on different waves of the same GBIP.

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[23] Question = "*What elements of the overall GBIP programme did you think were the most valuable to your business?*". Some responses to the question "*What elements of the GBIP market visit did you think were the most helpful for your business, and how could it be improved at any stage?*" also echoed this sentiment.

[24] Impact evaluation should explore in more detail the benefits that participating businesses derived from different aspects of the GBIP, as this will shed light on mechanisms through which desired outcomes are or are not achieved.

> *"It was great to get to know the other businesses that we went with. While we all had an AI connection, we were all very diverse in sector and size. Peer-to-peer learning is always really valuable"* - GBIP survey respondent

While GBIP experiences are typically good, delivery partners and participants highlighted that there can be variation in delivery quality

Focus group participants who had attended more than one GBIP noted that their experience and the quality of what was offered had been inconsistent. They highlighted having varied or insufficient notice of the visit programme and cohort peers, some lower value activities, and differences in the size of cohort which affected their overall experience. One participant mentioned that their cohort had been structured to have two separate in-country visits, which they found was a beneficial approach to allow them to properly exploit the opportunities available.

> *"It allowed us in the initial phase, to meet with some really big players... But I think it allowed us to get a really high-level introductions in the first instance and then exploit them as we then went into the second visit. I think that was a very powerful way to run the GBIP because it meant we could diversify [their experience to meet the needs of the business]."* - GBIP Participant

Evidence of a lack of GBIP standardisation can also be seen from the GBIP survey results. For example, the length of training received by respondents ranged from less than 1 day to over 3 days.[25] The most common length received was 2 days (by approx. half of respondents), followed by 1 day (by a quarter of respondents). Qualitative evidence also suggested that some, but not all respondents had the opportunity to receive feedback on their presenting / pitching as part of the market visit.[26] In addition, a few respondents who attended multiple GBIPs explicitly discussed variety in the structure and, in one instance, quality of the Get Ready Phase across different programmes.[27]

> *"Having already been on a GBIP… visit to [redacted]…, in which the pre-visit information, training and organisation was excellent, the pre-visit information, training and organisation by [redacted] was abysmal, dysfunctional and a shambles."* - GBIP survey respondent

Senior stakeholders and delivery leads noted that the GBIP programme has expanded since the Global team core budget was increased. To date 59 GBIPs have been delivered over the period 2022-23 to 2024-25, compared to 21 GBIPS over the three years prior.[28] They noted

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[25] Question = "*Approximately how many days of training and support did you receive as part of the pre-visit Get Ready phase?*" Base = 91, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*" and 4 respondents who noted their GBIP application was unsuccessful.

[26] Question = "*What elements of the GBIP market visit did you think were the most helpful for your business, and how could it be improved at any stage?*"

[27] Question = "*Please provide any further comments you have on the GBIP 'Get Ready' pre-visit phase, including any suggestions for improvements.*"

[28] Calculated using data in "*Global-data_Secondary-participants (3)*" provided by Innovate UK. Commitment year is used to determine which GBIPs took place during the period FY22/23 – FY24/25 (note that FY24/25 is still in progress).

that the increased volume has been accompanied by variation in delivery and engagement between partners, and acknowledged this poses a risk for overall quality of the experience.[29]

Delivery leads particularly emphasised that businesses' experience and outcomes can vary depending on the wider Domain Lead and subject expert enthusiasm and involvement. Domain leads for their part thought it important to be clear that the role of sector experts was supporting, not delivering, GBIPs.

> *"Where the process works well is that the domain teams provide the technical input into the scope and how can help those technical nuances that are in a country. But the business growth teams do the actual delivery of it. That works really well, as long as people are aware of that relationship. If not, I think it falls down."* Domain lead

There is a clear desire from all stakeholders for increased consistency of delivery approaches and governance. This includes clear definition and understanding at all levels on partners' roles and responsibilities (e.g. delivery partner, innovation leads, and the Global team) and on delivery expectations and processes.

Delivery partners would also like to develop opportunities for information and effective practice sharing between partners, both within GBIP delivery, and across Global products to better understand and connect the overall system.

Recommendations

In light of the above findings, the main recommendations concerning GBIPs are:

Recommendation 10: Recruitment methods for GBIPs need to be expanded to ensure sufficient high-quality applications from new businesses. This could be achieved through: promotion of GBIPs alongside relevant other Global products (e.g. CR&D competitions); advertising via Innovate UK channels as well as Business Growth network; advertising through industry groups or other local growth hub networks.

Recommendations 4 and 11: The Global team should ensure awareness and understanding of standardised guidance on the roles and responsibilities of different stakeholders in the delivery of GBIPs, and their expectations of GBIPs delivered. This should be shared and agreed with GBIP delivery partners. This guidance could include recommendations on delivery processes and best practice – for example, agreed framing for the scope and objectives of GBIPs, timelines for sharing GBIP visit programmes, and limiting large duration events on visits.

Recommendation 5: The Global team should take a more active role in monitoring GBIP delivery to increase accountability and help ensure product quality. This could include

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[29] This will be an important consideration for the impact evaluation – both in terms of an issue to explore, and an issue that will affect the appropriate design of the evaluation. It will be important for the impact evaluation to capture data and evidence from a large sample of participating businesses.

monitoring GBIP application rates, systemically collecting end-of-GBIP delivery reports (with lessons learned) from delivery partners, and organising knowledge sharing sessions with delivery partners to facilitate sharing of knowledge and best practice.

4.3   GIPs

Key findings:

Delivery partners highlighted **GIPs face challenges in recruiting sufficient high quality new business applicants** (similar to GBIPs).

Business participants are typically positive about their experiences of GIIPs, with the majority satisfied with their market visits, online training and the amount of time spent working with the incubator.

However, stakeholders (particularly businesses that had been on more than one GBIP) highlighted that **delivery quality varied across GIPs**. As with GBIPs, stakeholders stressed the **need for standardised guidance** on the roles and responsibilities of different stakeholders in the delivery of GIPs, expectations on product delivery, and an understanding of best practice.

28 GIPs have been delivered since April 2022.[30] GIPs were seen mostly positively by stakeholders, delivery partners, and businesses, and offered a helpful tool in the wider Global offer. Delivery partners reported that GIPs worked most effectively when there is a clear vision for the geography over time, where there is progression through a business completing a GBIP (although this was not necessarily seen as true for all businesses), and when the business has a good relationship with their IGS.

To support this wider understanding and vision, delivery partners would like to see improved hand-over from Business Connect to Business Growth when GEMs lead into GIPs and GBIPs, and delivery partners note that they find it challenging to access GEM reports.

> *"I would like to see more handover between Business Connect and Business Growth teams. So we're more informed as we take them on as a delivery partner. So we have the background, we know what that those objectives were, perhaps introductions to stakeholders and so on. There's a huge amount of work that go on with the GEMs, and I think there's a lot that we could benefit on from a logistics and planning point of view."* - GIP Delivery Partner

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[30] Based on the data in "*Global-data_Secondary-participants (3)*" provided by Innovate UK, using "commitment year" to determine those which took place during the period FY22/23 – FY24/25 (note that FY24/25 is still in progress).

GIPs suffer business recruitment challenges, similar to GBIPs

As with GBIPs, GIP delivery partners noted that there is recruitment fatigue among partners and an appetite to recruit from more diverse channels to engage more diverse cohorts. Around 5% of GIP participant organisations have attended two GIPs since April 2022.[31][32]

Like other stakeholders and delivery partners, GIP delivery partners wanted to see more join-up of the Global products and information sharing to increase progression and awareness of the different opportunities.

> *"I think what I'd like to see is a more joined up approach around the channels and how we do that. So, for example, [if an] R&D competition has just launched we will send out a blanket email to everyone that's been on a GIP/GBIP, and we do that as a delivery partner. We've got our records that are our records of all our cohorts and all their contact points and all that sort of stuff. But it would be good to do that more centralised to make sure that we are actually reaching everybody. So it feels like we're doing it all individually and it would be nice for that to be more joined up."* - GIP Delivery Partner

Stakeholders are positive about the application processes and the role of IGS support in this early phase

GIP focus group participants were mostly positive about the GIP application process and found this quite straightforward. This is consistent with survey evidence – Figure 8 shows almost all GIP survey applicants were happy with the various elements of the GIP application process. (Similar to GBIPs (Figure 5), almost 1 in 5 respondents did not receive help or guidance from Innovate UK, but this is likely because they did not seek such help or did not perceive it as coming from Innovate UK.)

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[31] Calculated by identifying repeated company names in the spreadsheet "Global-data_Secondary-participants (3)" provided by Innovate UK (using the commitment year to determine those which took place in financial year 2022-23 onwards). This may be an underestimate, due to imperfect matching of company names. Some simple cleaning of names was conducted (e.g. to remove trailing blanks, and to ensure no difference in capitalisations), but differences in spelling would be counted as different organisations.

[32] The implication of this for the impact and value for money of the GIPs should be explored as part of any future impact evaluation.

Figure 8   Views on GIP application process
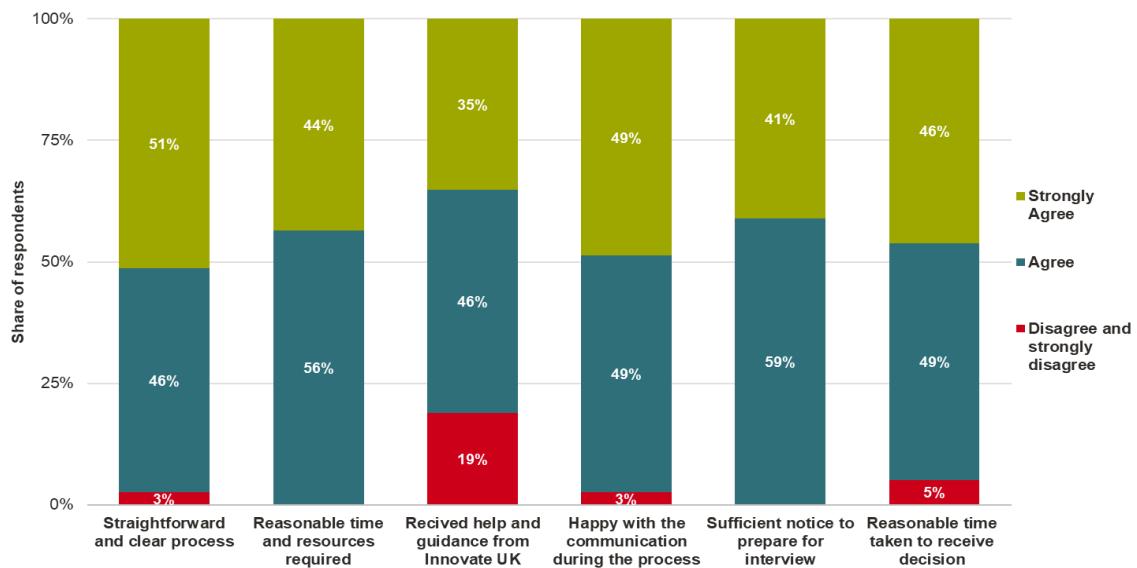
Delivery partners reported that early interviews and support from IGS throughout the application process helped better prepare businesses and raise their awareness around financial commitments for taking part and manage expectations. Similarly, participants noted that the support of their IGS had been helpful during this early stage.

However, delivery partners noted that overall in the programme the role of the IGS is mixed, they found that in some instances they can work really well as a critical friend and identifying potential challenges and issues, but they can seem like a 'spare part' as the GIP progresses if the wider support from the delivery partner, in-country mentor, and incubator is of high quality.

> *"We invite the IGS at the beginning, try and get them to engage and do the action plans and things and invite them along at the end. We don't really chase the IGS's at all during the programme as such unless there's an issue, we don't regularly get them involved in anything.... whether we should or not, don't know."*- GIP Delivery Partner

Most businesses are positive about the preparation phase but there was some variability in experiences

Survey evidence on the usefulness of the GIP preparation phase broadly mirrors that for the Get Ready phase of GBIPs (see Section 4.2), with around 80% of respondents finding the

strategic action plan useful and 90% finding the pre-visit workshop useful. [33] However, this stands somewhat in contrast to the perceptions of the focus group participants.

The preparation workshop was helpful for some focus group participants, but others did not remember it. This is consistent with GIP delivery partners indicating that there can be some variance in what is offered during the preparation phase. GIP survey evidence points to a lack of standardisation on the number of days of training and support received by GIP respondents: 20% received less than one day, while 11% received one day, 17% two days, 14% 3 days and 37% more than three days.[34] Just over two thirds of GIP survey respondents (slightly less than GBIP respondents) agreed to some degree that the quality and length of training and support activities were sufficient.[35] Pointing to a lack of standardisation more widely, one survey respondent also commented the following:

> "[I] Have taken part in Canada, Singapore, Netherlands and Spain GIP - the quality and impact of the event is very variable depending on the host organisation." – GIP survey respondent

The focus group participants did not find the strategic action plans useful. Their plans had not been subsequently referred to or mentioned as part of the GIP.

> "We were asked to prepare this strategic development plan. I did fill it out, but I didn't spend much time on it because I've been through these things enough times by now to know that it was going to be completely irrelevant, and lo and behold, it was completely irrelevant. It was never referred to again either by IUK or other delivery partner (in-country). It could have been maybe a really useful thing to do and keep updated and actually think through with the mentors from Business Connect and the delivery partner…and maybe it's on us to bring that forward, but we've got enough things as founders to worry about." - GIP Participant

A key take-away from the qualitative survey evidence[36] is the need for more information to be provided during this preparation phase, to help participants maximise the benefits of the later phases. This includes an agenda for the market visit, greater information on the market and market contacts, as well as some support for how to engage with contacts, for example.

The majority of GIP participants were satisfied with the market visits, online training, and length of time spent working with the incubator

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[33] Question = "*How useful did you find each of the following components in preparing you for your visit?*" Base = 39 respondents, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*".

[34] *Question = "Approximately how many days of training and support did you receive as part of the preparation phase?"* Base = 35, which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

[35] Question = "*To what extent do you agree or disagree that the quality and length of training and support activities received in the preparation phase were sufficient?*" Base = 39 respondents, which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

[36] Question = "*Please provide any further comments you have on the GIP Preparation phase, including any suggestions for improvements.*"

Overall, as indicated by Figure 9, the majority of GIP survey respondents (approx. 5 out of 6) were satisfied to some degree or neutral regarding most elements of the first GIP market visit. However, there was less satisfaction with the opportunities available to make or strengthen relative connections - almost 30% of respondents were very or fairly dissatisfied about this.

Figure 10 presents GIP survey respondents' views on different aspects of the online programming sessions delivered by the incubator. These are also largely positive, especially regarding the delivery of the sessions. Having said that, a significant minority (almost a third) did not think the sessions helped them to maximise the benefits of their market visit, suggesting a potential disconnect between the two aspects of the programme.

Figure 9   Views on first GIP market visit
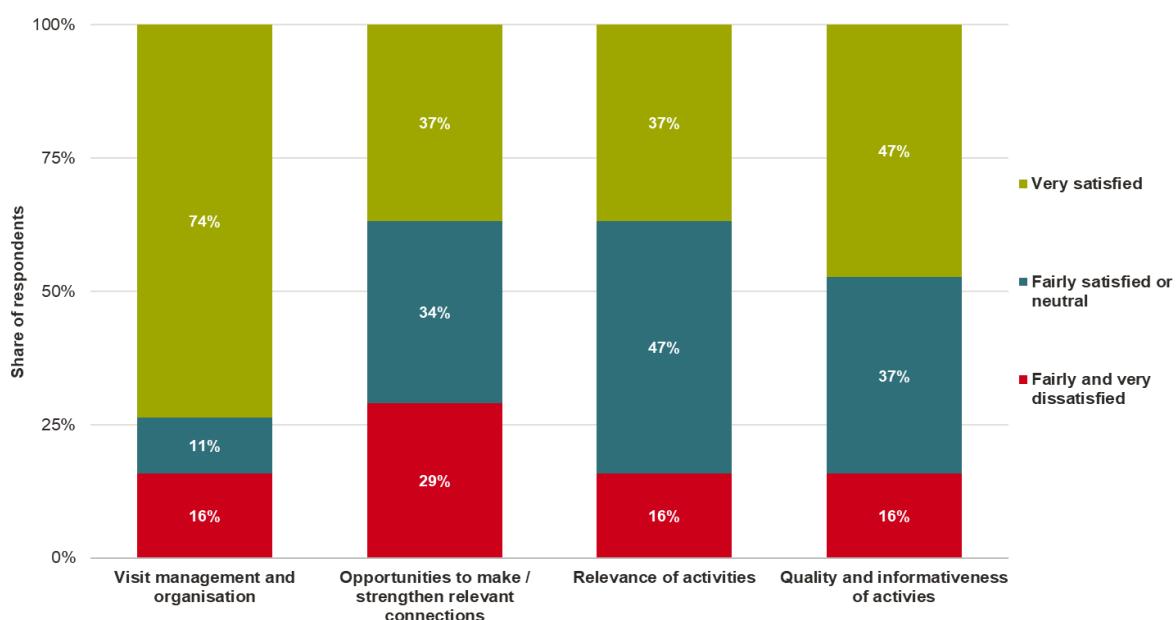
Source: Frontier Economics based on own survey data.

Note: Question = "With regard to your experience of the first market visit, how satisfied were you with the following components? Please chose one answer per statement."

Base = 38, which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

Figure 10   Views on GIP online programming sessions
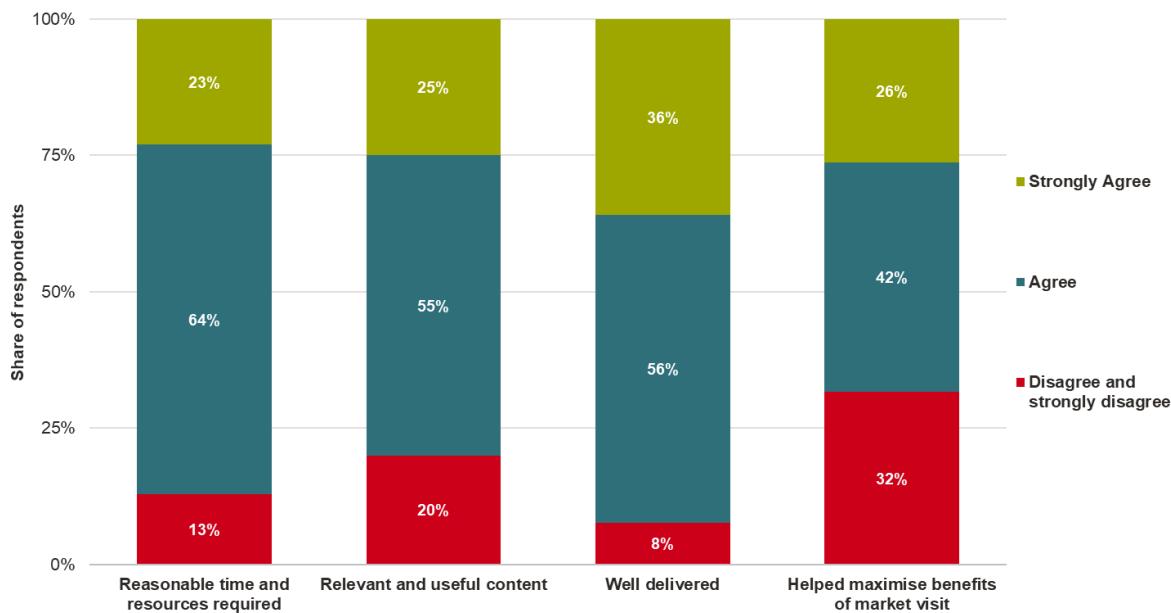
When respondents were asked to comment openly on these sessions,[37] a few key themes emerged which may help explain some of the more negative views. For example, some reported that the online sessions had a "*sales-pitchy*" tone or could have been more interactive. Additionally, as with the GBIP preparation workshop (see Section 4.2), several respondents (particularly those from more established companies) thought the content was too generic and not focused enough on the specific market. One suggestion was that the GIP cohort could be split up, to allow for more accurately tailoring of sessions to the participants experience level.

> *"Our group consisted of very early start-ups with no investment, seed-level start-ups and established SMEs. Therefore, there was a lot of emphasis on pitch preparation and investment advice - for those of us with investment we could of split into another group to do alternative sessions."* - GIP survey respondent

The majority of GIP survey respondents also held generally positive or neutral views about the second GIP market visit (shown in Figure 11). However, a significant minority (around 30%) were fairly or very dissatisfied with the number and relevance of attendees for their demo day.

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[37] Question = "*Please provide any further comments you have on the online programming sessions delivered by the incubator, including any suggestions for improvements.*"

This latter point was echoed among GIP focus group participants. Focus group participants were critical of the second visit, where they thought this was mostly aimed at developing presentation skills and materials for the final showcase event.

> "The second visit was really focused on… it was all leading up basically to one afternoon of showcasing all of the businesses and a three-minute presentation supported by a 30 second video. Frankly that was all about making the delivery partner look good, it really wasn't about making us look good if I'm really honest. And that took two weeks. So certainly we spent the better part of a week and a half rehearsing for that three-minute presentation."
> - GIP Participant

Participants also reported more could be done to ensure the right attendees are present at the workshop event, with more potential investors and partners being engaged.

Figure 11   Views on second GIP market visit
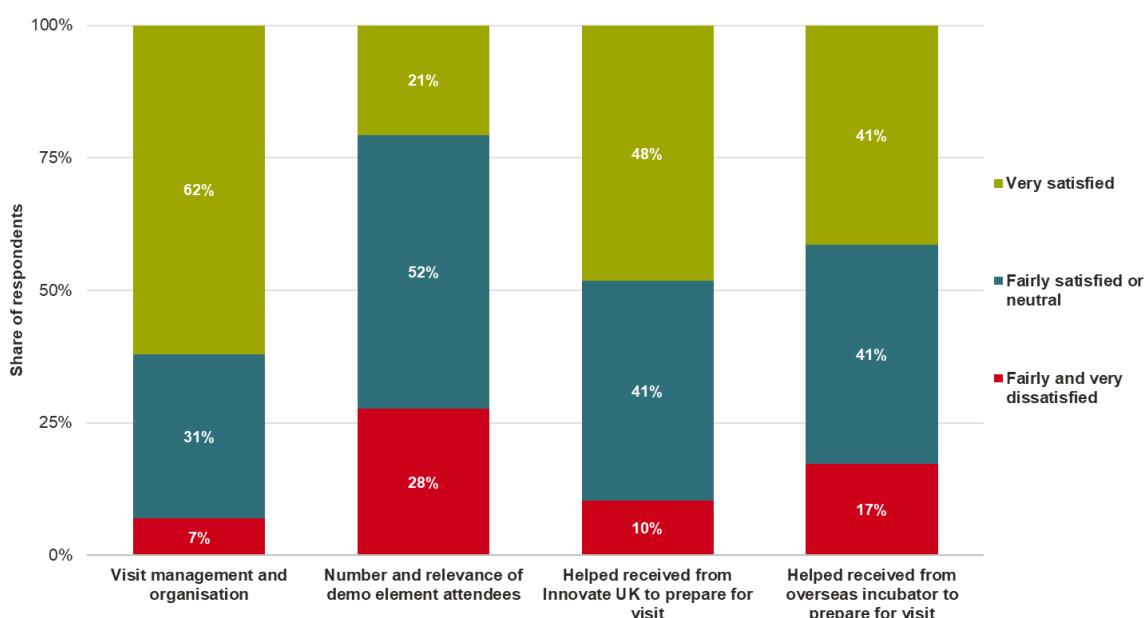
Source: Frontier Economics based on own survey data.

Note: Question = "If yes, with regard to your experience of the second market visit, how satisfied were you with the following components? Please choose one answer per statement."

Base = 29, which any respondents who did not answer yes to the question "Did you participate in a second market visit as part of your GIP"

In terms of the overall length of time spent working with the incubator, just over two thirds of survey respondents believed that the length of time they worked with an incubator was about right. The majority of the remaining respondents believed it was too short.[38] The focus group feedback was that the overall 4-week length of the GIP visits was thought to be appropriate;

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[38] Question = "Overall, how did you find the length of time working with the incubator?" Base = 39, which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

however, GIP participants thought it would have been more effective if these were delivered as four one-week blocks to have more impact.

The majority found the post-incubator phase useful, but some would have valued more structured actions after the programme

Figure 12 demonstrates GIP survey respondents' views on the usefulness of different post-incubator phase elements. The majority of respondents (70-80%) found all aspects useful.

Figure 12   Views on usefulness of post-incubator phase
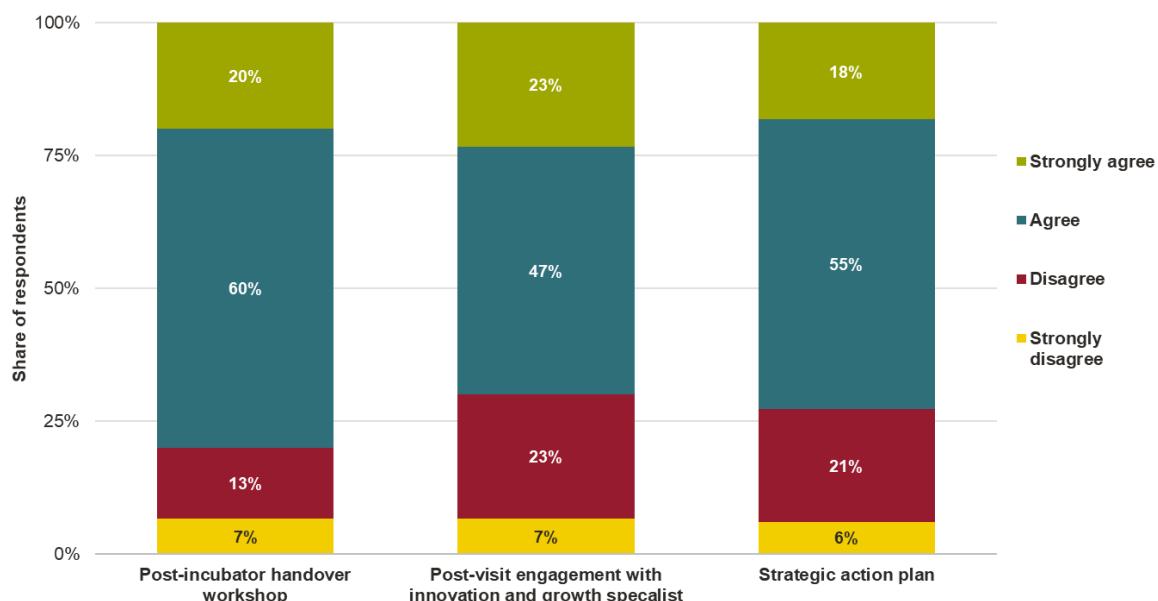
Source: Frontier Economics based on own survey data.

Note: Question = "How far do you agree or disagree that the following components of the post-incubator phase helped maximise the benefits of the GIP? Please chose one answer per component.
Base = 30-33, which any respondents who did not answer yes to the question, which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

As with the GBIP survey (see Section 4.2), despite 30% of GIP survey respondents not finding the post-visit engagement with the IGS useful, less than 10% were actually very or fairly dissatisfied with the overall amount and quality of the IGS input / advice they received.[39] Again, this potentially indicates that the reason most of the respondents who did not find the post-visit IGS engagement, was because they believed it was unnecessary, not that there were issues with the quality or frequency of the engagement itself. This is consistent with the views

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[39] Question = "*How satisfied, if at all, have you been with the overall amount and quality of input or advice received from your Innovate UK Business Growth innovation and growth specialist*?" Base = 39, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*".

of the GIP delivery managers stated above on the IGSs' role, and was also referenced by one respondent as part of their qualitative feedback[40]:

"I didn't really have much need for the specialist as we had a clear idea of how we were looking at this. This is probably because of our existing experience level. An earlier startup may have found more value in this." - GIP Survey respondent

GIP participants did discuss in the focus group a view that they had benefited from the support of their IGS as well as mentors and wider experts they had access to in the incubators, although it was noted that this could be a 'lottery' depending on who is assigned or available.

Similar to GBIPs, one key insight from some of the qualitative survey evidence[41] is that several GIP respondents would have preferred some more structured follow-on actions after the programme. Specific suggestions noted includes further follow-up sessions with advisors, or even extending the program and adding in additional targeted visits.

"Some structure to follow up events/actions would be useful- connections rather fizzled away afterwards." - GIP Survey respondent

Recommendations

Several recommendations are made concerning GIP processes. These recommendations are largely analogous to those made for GBIPs, given the many similarities in the findings above – in essence that the majority of businesses' experiences are good, but there would be benefit reducing variation and standardising delivery around best practice. One recommendation (3) also builds on one of the recommendations from Chapter 4.1.

Recommendation 3: The Global team should work with Business Connect and Business Growth delivery partners to increase the flow of information on the context around GIPs. This could include: building and disseminating a standard repository of GEM reports; and proactively highlighting to partners where GEM and GIP (and other products) relate.

Recommendation 10: Recruitment methods for GIPs need to be expanded to ensure sufficient high-quality applications from new businesses. This could be achieved through: promotion of GIPs alongside relevant other Global products (e.g. CR&D competitions); advertising via Innovate UK channels as well as Business Growth network; advertising through industry groups or other local growth hub networks.

Recommendations 4 and 11: The Global team should produce standardised guidance on the roles and responsibilities of different stakeholders in the delivery of GIPs, and their expectations of GIPs delivered. This should be shared and agreed with GIP delivery partners

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[40] Question = "*Is there anything else which could have helped you to maximise the benefit from the GIP?*"

[41] Questions = "*Please provide any further comments you have on the GIP Pursue phase, including any suggestions for improvements*" and "*Is there anything else which could have helped you to maximise the benefit from the GIP?*"

to ensure awareness and understanding. This guidance could include recommendations on delivery processes and best practice – for example, length and content of pre-visit workshops; scope and objectives of the second visit; and using strategic development plans more consistently.

Recommendation 5: The Global team should take a more active role in monitoring GIP delivery to increase accountability and help ensure product quality. This could include monitoring GIP application rates, systemically collecting end-of-GIP delivery reports (with lessons learned) from delivery partners, and organising knowledge sharing sessions with delivery partners to facilitate sharing of knowledge and best practice.

4.4   Global Explorers

Key findings:

Business satisfaction with the Global Explorers application processes is lower than with other Global products. Feedback highlighted challenges with the excel format of the application, its inflexibility, the lack of clear guidance, poor communication, and slow decision making. This was acknowledged by the delivery partner to be in part due to the unexpectedly high number of applications.

Businesses have also found the claims process to be disproportionate – perceiving it to be overly and unnecessarily exacting, complex and slow. For some businesses this was reported to outweigh the value in applying for Global Explorers.

Global Explorers is seen by businesses as an attractive product in principle

Global Explorers was seen by participants to be a beneficial way to engage with a new territory, that can be impactful for their business by enabling them to engage with supply chains – when it works well.[42]

Similarly, the delivery partner believed that the high level of interest in the product shows a gap for this type of support post-GBIP/GIP and more widely for SMEs exploring new markets. 131 businesses applied and were approved for a Global Explorers grant since September 2023 when the programme started and July 2024 when the programme was paused for new applications. [43]

Like other delivery partners, the delivery partner for Global Explorers reported that they would value finding out more about the impact of the programme overall.

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[42] Future impact evaluation should explore the outcome of Global Explorer participation for businesses, and for how many businesses the benefits of participation outweigh the costs.

[43] Based on the data in "*Global Explorers Data 050724*", provided by Innovate UK.

The application process has been paused, with improvements already identified by the delivery partner

Global Explorers is currently paused for new applications and during this time the delivery partner is considering various improvements to its system, for example upgrading from an excel-based application form (which was seen as old-fashioned by applicants) to an online form. The delivery partner also noted that there were some delays in the initial application and assessment process due to receiving a significantly higher number of applicants at this time, and if this happened again in the future they would consider how to more effectively communicate this to Innovate UK and businesses.

These limitations with the application processes are reflected in the survey responses from Global Explorers participants. The survey evidence indicates a more negative view of application processes compared to other products. Excluding "received help from an IGS", a sizeable share (between 30 - 50%) of Global Explorers survey respondents appear to have some level of dissatisfaction with the application process. This confirms the need for the improvements which the delivery partner is already undertaking.

Figure 13   Views on application process of Global Explorers
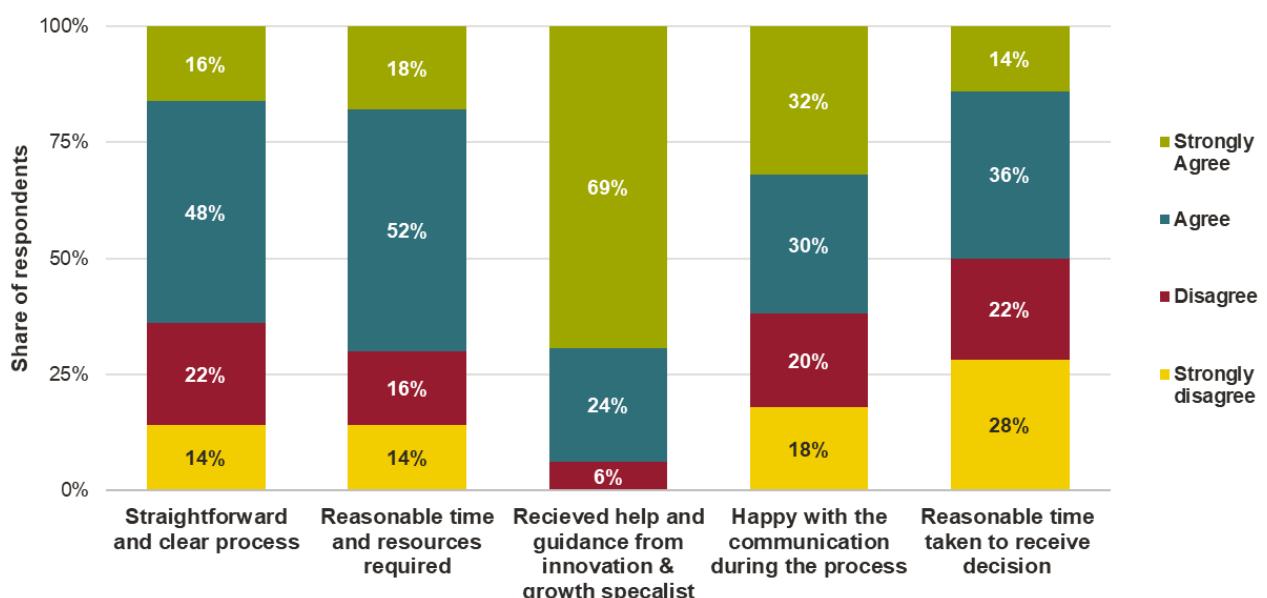
Source: *Frontier Economics based on own survey data.*
Note: *Question = "With regard to the application process, how far do you agree or disagree with the following statements?"*
         Base = 49-50, which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

Survey respondents were asked for any further comments on the Global Explorer application process.[44] Several key criticisms and suggested improvements emerged, including:

- The **excel format** of the application process, which the deliver partner are already in the process of changing (as noted above).

- The **inflexibility** of the application form. For example, several respondents noted having provide cost estimates for travel far in advance, when dates and flight costs could change over time. This was not believed to be understood or taken into account by the Global Explorers delivery team.

    "The only issue we had was that plans change, and the GE application set up is not designed for changing plans or plans evolving. They were very strict on the times of events and locations. In reality, there are other opportunities that come up and would be better for the project, and it took time to go back and forth for the team to approve them." - Global Explorers survey respondent

- **Lack of clear application guidance**. Some reported that they were presented with un-anticipated additional rules or information requests during the process. Others noted particular areas of the application which they found unclear, such as how the 'per diem' rates are calculated and how travel costs should be presented.

    "I found that they kept changing the goal posts of what they needed and also didn't make it clear from the start of what was required. The process was confusing and laborious, because of the constant back and forth." - Global Explorers survey respondent

- **Poor communication** from the Global Explorers delivery team and in some cases extensive chasing was required for updates or decisions on the application.

    "…the representative from "Global Explorers" was often unresponsive, and some of their answers were contradictory." - Global Explorers survey respondent

These issues are largely in line with those acknowledged by the delivery partner.

The delivery partner also highlighted particular areas where they believed programme processes had worked well. This included:

- The relationships between them and IGS's which have been built over time. This has increased IGS knowledge and understanding of the programme and improved the quality of applications.

- Regular meetings with IUK which support ongoing improvement and feedback.

- The due diligence process at EOI stage. This has been particularly effective in reducing time spent on full applications and identifying any issues early (including lack of understanding of high growth self-funded criteria).

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[44] Question = "*Please provide any further comments you have on the Global Explorers application process, including any recommended improvements.*"

Businesses have found claims processes to be disproportionate

Global Explorers focus group participants were vocal in describing their experience of the programme to be challenging due to what were perceived as overly and unnecessarily exacting, complex, and slow claims processes. This was perceived to create a disproportionate burden on businesses. In a few (but not all) cases, this was seen to counter-act the value in applying.[45]

Focus group participants described numerous instances of experiencing barriers and challenges when making claims against the grant funding. Particular issues were found with travel claims where variances had occurred due to changes in plans or dynamic pricing systems. They also described concerns at having to share bank account records as part of their claims, when it was thought invoices and receipts should be sufficient.

> *"You understand that you have to jump through hoops. This is literally an expense reclaim for legitimate expenditure, which is receipted, and it is unfathomable …. we had a situation where they can't calculate the number of days and they couldn't figure out the flights it's just that you shouldn't need that level of detail. You should have a flight was taken, here is the receipt for the flight, refund the flight. It's kind of that basic as a grant and the process is just doesn't reflect that in any way."* - Global Explorers Participant

Similar complaints were discussed by Global Explorer survey respondents,[46] who also pointed to a lack of clear guidance on how to make a claim and poor communication from the Global Explorers administration team during the claims process. Several noted they were still awaiting (at least some) reimbursement or did not receive the full reimbursement amount they were expecting.

> *"The reimbursement process was pedantic. Most of the request did not make sense and it took so much time that we didn't even bother filing some of the minor receipts. Very poor on communication and on helping to facilitate the process."* - Global Explorers survey respondent

Overall, focus group participants compared their experiences negatively to other grants received via Innovate UK (including Smart Grants), and noted that the overall approach to Global Explorers seemed more akin to a local authority grant process than an IUK grant.

> *"I would say the experiences you're getting would probably be the same if you were getting/ at the receiving end of a of a local government grant."* - Global Explorers Participant
>
> *"I think the point is it is under Innovate UK, and if they're going to use a partner who's got that local authority thinking they need to ditch that, it's simply not good enough."* - Global Explorers Participant

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[45] It is important for future impact evaluation to quantify the scale of this sentiment as this will be important in assessing the outcomes of the Global Explorers programme.

[46] Question = *"Please provide any further comments and you have on the Global Explorers programme, or any suggestions for how it could be improved."*

Some respondents also suggested that the structure of grant could be improved. Currently businesses are required to pay upfront and then reclaim expenses. Businesses reported this could lead to cashflow issues for small businesses, particularly when compounded by issues and delays during the claiming process.

Global Explorers businesses are typically positive about their engagement with Innovation and Growth Specialists

Global Explorers focus group participants were mostly very positive about the support received from their IGSs' and advisers and found them responsive and helpful. In particular, participants found the process more efficient when they submitted claims via their Innovate Adviser and received support from them in terms of the value and number of claims.

> *"The growth specialists were brilliant. You could get hold of them when you needed to. They always responded to you."* - Global Explorers Participant

> *"They [the IGS] know your business quite well…he was actually very helpful in guiding us around the scope of the grant and what we put it to as a project. He advised to keep it very narrow and very focused, I think that that paid dividends in terms of our process of what we claim for and how few things we were claiming for, but slightly bigger items."* - Global Explorers Participant

Such positive views regarding the IGS's are consistent with the survey results. As shown in Figure 13, Almost all respondents reported they received help and guidance from their IGS to complete the application. A similar proportion (92%) also agreed or strongly agreed that their IGS engagement throughout their project helped them to maximise the programme's benefits.[47] However, almost 1 in 5 respondents would have preferred either lots more or slightly more engagement, indicating a potential area for improvement.[48]

In their responses to the free-text survey questions,[49] several respondents re-iterated similar positive views regarding their IGS, to those expressed by the focus group. However, some did note that at times the IGS seemed like an 'intermediary' or 'middleperson' between them and the Global Explorers administration team. This was not always considered to be helpful as (i) the IGS had limited power to influence the Global Explorers admin team and / or (ii) it actually formed an extra layer adding to the inefficiency. Therefore, a potential improvement would be

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[47] Question = *"How far do you agree or disagree that your ongoing engagement with your Innovate UK Business Growth innovation and growth specialist throughout the duration of your project helped (or is helping) you with maximising the benefits from your Global Explorers project?"* Base = 48, which excludes any survey respondents who answered "*Don't know"* or "*Prefer not to say".*

[48] Question = "*Would you have liked more or less frequent engagement with your Innovate UK Business Growth innovation and growth specialist related to your Global Explorers project?"* Base = 47, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*". Only one respondent would have preferred less engagement, all others thought the level received was suitable.

[49] Questions = "*Please provide any further comments you have on the Global Explorers application process, including any recommended improvements*" and "*Please provide any further comments and you have on the Global Explorers programme, or any suggestions for how it could be improved.*"

to introduce a means of direct contact between the delivery partner and participants, e.g. an online 'help' session to answer questions.

"The IUK Business Growth innovation and growth specialist was a middleperson. They had no authority to approve, nor did they have the answer to many questions. So they ended up being a step that slowed the process down (in application and in project life)." - Global Explorers survey respondent

Recommendations

The findings above suggest two key areas for improvement for the Global Explorers programme: clarifying and speeding up the application process, and simplifying the process for making claims. Both of these are areas where the Global team are already in discussions with the delivery partner about improvements that can be made.

Recommendation 12: The Global team should work with the delivery partner to ensure that application processes have been clarified and sped up. This includes: switching to an online application process; clarifying roles and responsibilities (e.g. who has authority and responsibility for answering business enquiries); and determining appropriate communications and strategies that can implemented if applications are greater than anticipated. One potential strategy for the introducing redundancy could be to have an EOI process open every other month. This would allow businesses the confidence and flexibility to apply when appropriate for them, while allowing the delivery partner to have some 'slack' in the system to process unexpectedly high applications.

Recommendation 13: The Global team should agree with the delivery partner a simplified claims procedure that is more proportionate for the size of the programme and claims being made by businesses. This could include automatic authorisation of claims within certain thresholds or certain types of expenditure, on production of valid receipts. The requirements for multiple quotes or for sight of bank records should be dropped.

4.5   Bilateral CR&D and Eureka programmes

Key findings:

The majority of business applicants to CR&D and Eureka programmes were positive about the application processes, but only just over half of businesses agreed that "reasonable time and resources were required for the application".

Just over half of businesses reported the time and resources required for monitoring processes to be very or quite reasonable, while a significant minority (17%) thought the time and resources required were very or quite unreasonable.

There was **some dissatisfaction from businesses about the lack of alignment of application processes, decisions making with international partners**. However, this is not something that is within the control of the Global team.

To date 18 CR&D and 10 Eureka competitions have been delivered since April 2022.[50] Overall the Global Management Team think partnership managers and Eureka colleagues have done a good job at ensuring that bilateral CR&D competitions and Eureka programmes have been delivered.

There were some initial delays, with fewer CR&D competitions delivered in 2022-23 than originally planned.[51] This was attributed to the timelines required to establish initial relationships and agreements with international partners.

It was also noted that the use of the Innovate UK 'machinery' means they can experience calendar and process constraints, which can potentially impact on when, how, and if different CR&D opportunities are deployed.

> *"Some of our processes and products, they don't really fit that mould, which makes it quite hard to get things off the ground and a lot of processes are just like a sledge hammer to smash a nut, so to speak. So, I think that's also quite a problem."* - Partnership Manager

In addition, Partnership Managers noted that setting up a competition is time-consuming for them as they do this infrequently and have to re-familiarise themselves with the process each time. As such, they thought more support from the central team would be beneficial in delivering competitions to help with their overall capacity and address any challenges using Innovate portal. For the Eureka team, they noted that using the 'funding machinery' is quite a regular activity, so while it is labour intensive, they are used to this process.

The majority of business applicants were positive about the application processes, but less so than for most other Global products

Figure 14 presents the views of CR&D survey respondents on different aspects of the CR&D application process. 77% of applicants agreed or strongly agreed that they were "happy with the communication during the application process", 69% agreed or strongly agreed that "Processes were straightforward and clear", while 58% agreed or strongly that "reasonable time and resources were required for the application". Whilst businesses were generally positive, this does mean that a sizable minority were not. For example, 42% disagreed that

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[50] Based on the data in "*Global Project and Participant Info*" and "*SCTASK0114671- RITM0110881 - process evaluation project of programmes delivered through the GC budget*", provided by Innovate UK. The dates provided in the competition code (e.g. 2005) were used to determine those which took place during the period FY22/23 – FY24/25. It is noted that FY24/25 is still in progress.

[51] This may may have implications for the outcomes of the Global programme, and whether expected impacts are achieved, and therefore should be examined as part of an impact evaluation.

the time and resources required for the application was reasonable.[52] The levels of dissatisfaction are lower than with the Global Explorers application process (see Figure 13), but greater than for the other Global products (see Figure 3, Figure 5, and Figure 8).

Figure 14   Views on application process of CR&D competitions (all applicants)
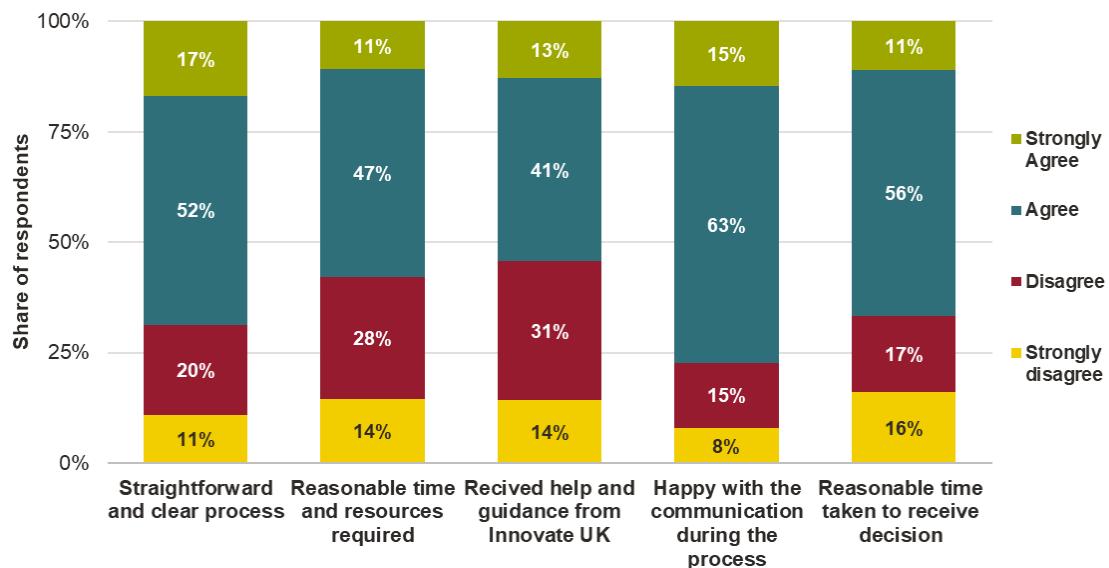
Source: *Frontier Economics based on own survey data.*

Note: *Question = "With regard to the application process, how far do you agree or disagree with the following statements?"*
            Base = 70-83, which excludes any survey respondents who answered "Don't know" or "Prefer not to say".

Results for Eureka survey respondents must be interpreted cautiously due to small sample sizes, but are fairly similar to the figures for CR&D in Figure 14. The number of respondents agreeing or strongly agreeing with the statements ranges from 47% (time and resources required were reasonable) to 75% (time taken to receive a decision was reasonable).[53]

An important takeaway from the focus group and qualitative survey feedback on CR&D application processes[54] is the desire for increased consistency and alignment with Innovate UK's international counterparts. For example, some participants thought that there was a difference in selection criteria, leading to challenges when constructing applications. Others noted the additional work required due to different application forms and application portals being used. Eureka respondents also noted similar issues regarding duplication of effort, between the Eureka, Innovate UK and Innovate UK international equivalent application form.

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[52] Unsurprisingly, the picture is even less positive when looking at just unsuccessful CR&D applicants. In particular, a majority of unsuccessful survey respondents believed the application did *not* take a reasonable about of time and resources (54%) compared to 30% of survey respondents who were successful in their application.

[53] Base = 16-17, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*". Results must be interpreted with caution due to the low sample size (due to a low survey response rate).

[54] Question = "*Do you have any further comments on the funding competition application process that you would like to share, including any suggestions for how it could be improved?*"

However, it should be caveated that there is limited Innovate UK control over the Eureka application process, or international counterparts' grant application processes.

> *"As two different countries were involved in the proposal the finances and paperwork had to be repeated to some extent. If this could be sorted in only one platform, it would be much easier to apply."* - CR&D survey respondent

> *"It is very time-consuming to apply in three different platforms (Eureka, Innovate UK, NEDO), which ask the same information but in different ways. It means writing three proposals, and aggregating budgets in three different ways and in three currencies. The scope for error and for missing points in the evaluation is tripled."* - Eureka survey respondent

> *"The German partners, they won the grant and we didn't. So that that just showed to us, I don't know if it's true or not, but the German project office and the IUK didn't talk at all about the applications because we can't see how it could be so amazing for the German project office, and then I UK rejected it. So, we just think there was no link whatsoever."* - CR&D recipient

Businesses are typically positive about the experience of receiving grants, though report finding monitoring processes more arduous their than international partners

Moving on to the grant processes themselves, just under three quarters of successful CR&D survey respondents agreed or strongly agreed that a reasonable time was taken to set up their project and receive funding.[55] Results were similar for Eureka survey respondents (two-thirds agreed or strongly agreed that the time taken was reasonable).[56]

Whilst most CR&D recipients engaged qualitatively were positive about receiving CR&D funding, they had concerns about the overall monitoring processes involved, finding these to be significantly more complex and exacting than those experienced by their international partners, and arguing these were disproportionate. In some instance this had led to delays in project sign-off and delivery, which had to be negotiated with international partners who had already secured funding.

> *"Whenever we spend any money in non-GB pounds, we have to then evidence exchange rates and there's quite a lot of complexity around that sort of thing. It's quite excessive and there seems to be quite a high level of deterrence against using any foreign suppliers."* - CR&D recipient

> *"The other thing that we find confusing sometimes is we have a number of different projects and we have a different monitoring officer for all of those different projects and they're all very different in how they approach the process. So sometimes we just don't really know where to start. We're submitting our reports with all the best intentions and*

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[55] Question = "*To what extent do you agree or disagree that the time taken to set up your project and receive funding was reasonable?*" Base = 37, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*", or did not answer yes to the question "*Was your application successful?*"

[56] Base = 12, which excludes any survey respondents who did not answer yes to the question "*Was your application successful?*" Again, results should be interpreted with caution due to the low sample size.

then they're coming back with all completely different questions and it's very difficult. There's not a lot of clarity." - CR&D recipient

Similar issues were discussed in the CR&D and Eureka qualitative survey responses.[57]

Quantitively, over half of CR&D respondents reported finding the time and resources required for monitoring processes to be very or quite reasonable, while a significant minority (17%) thought they were very or quite unreasonable.[58] Again results were very similar for Eureka survey respondents.[59]

Recommendations

The findings above suggest a few areas where participants saw room for improvement. However, these are aspects that are within the remit or control of the Global team, and therefore they do not result in recommendations for process changes. The only recommendation relating to bilateral CR&D competitions that is made relates to the internal Global team process for setting up competitions internally:

> **Recommendation 14:** The Global central team should provide support to the partnership managers to navigate the approvals gateway process and set up competitions. This is because it would be more efficient for one person familiar with the system to do for all the Global competitions, rather than all the partnership managers, who do this infrequently, to each have to become familiar with the system.

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[57] Question = "*Do you have any further comments on processes surrounding your grant, including any suggestions for improvements?*"

[58] Question = "*How reasonable or unreasonable do you find the time and resource required to complete the monitoring information required for this grant (e.g. project start, quarterly monitoring and/or project close reports)?*" Base = 35, which excludes any survey respondents who answered "*Don't know*" or "*Prefer not to say*", or did not answer yes to the question "*Was your application successful?*"

[59] 7 out of 12 respondents found that the time and resources required to be very / quite reasonable, whereas 2 out 12 thought they were very / quite unreasonable. Base = 12, which excludes any survey respondents who did not answer yes to the question "*Was your application successful?*" Again, results should be interpreted with caution due to the low sample size.

5   Findings – Theme 3: Governance and coordination

The third theme of the process evaluation explores governance and coordination, with an overarching question: "To what extent, and how effectively, have governance and coordination processes supported delivery?"

Key findings:

The Global Management Team noted that, while flexibility and autonomy with their team is important, **decentralised decision-making can lead to some budget creep.**

Delivery partners currently have considerable autonomy in the delivery of Global products**. However, this can result in variation in product experience and quality**. This arises due to lack of clarity about different partner roles, a lack of clear guidance about expectations and best practice, and a lack of monitoring of product delivery.

There are examples of where **products have interacted and worked together or informed each other to support strategic objectives**. However, there is a lack of systematic evidence on where this is intended or has been achieved.

All delivery partners indicated that **more could be done to increase interaction and understanding between teams to ensure products are aligned better and designed in a way to maximise value**.

There is ongoing learning by some Global delivery teams. However, **some opportunities for improvement that have been previously identified have not yet been enacted**. Furthermore, **some opportunities for learning exist but are not currently being exploited**.

5.1   Internal flexibility and autonomy for delivery partners

The level of flexibility and autonomy within the programme was seen by senior stakeholders and delivery teams as a particular advantage in supporting the pace of delivery and interaction with international partners. However, some disadvantages were noted.

Internal Global team flexibility supports the pace of delivery, but can lead to budget creep

The Global Management Team noted that, while flexibility is important, decentralised decision-making can lead to some budget creep. Team members thought more review and discussion might be helpful when establishing multi-year forecasts or when identifying opportunities to be more agile and responsive by re-prioritising budgets across geographies depending on demand.

There was an appetite from the senior stakeholders to have a clear case for decision-making and budget setting, including factors relating to supply, demand, and opportunity which could be further discussed in monthly leadership meetings.

> *"Supply could be the, but the available budget from the partner country, demand is how many people apply, opportunity is how many people apply could be funded. If all three of those are much higher than your budget, then I think that makes a good case to increase the budget."* - Global Management Team Member

It was noted that data transparency can be a limiting factor. Often people have information in their heads rather than recorded, again indicating that further standardisation in recording activities may be beneficial.

> *"It's a fragmented landscape, and that's a good thing, because everyone's getting on with their jobs. But to manage the flows of information from delivery...the problem of fragmentation isn't anything to do with our structure, it's to do with the fact that we've got an imperfect Innovate UK business case planning approval system which doesn't do what we need it to do. So we have to create a separate parallel Excel spreadsheet system which plugs in the gaps. But that means that all the team interacting with two systems and delivering on the ground, and we're trying to navigate all three and the numbers that are produced from one have to be augmented with another, so it's complex."* - Global Management Team Member

Delivery partner autonomy helps the pace of delivery, but can lead to lack of clarity and variation in product quality

Some concerns were also raised by across senor stakeholders and delivery teams regarding where delivery partner autonomy and flexibility can have negative impacts. This included where some lack of clarity about different partner roles, and a lack of clear processes, can lead to variation in product experience and quality.[60] This is discussed in more detail with respect to GBIPs (section 4.2) and GIPs (section 4.3).

> *"I think knowledge of those roles and responsibilities would be good, so we can point to something that says 'this is what we're in charge of as Innovation Leads, this is what they're in charge of as Business Growth. It should be fluid, don't get me wrong, we shouldn't put ourselves into rigid processes."* - Domain Lead

This re-enforces recommendations made in respect to GBIPs and GIPs in Chapters 4.2 and 4.3:

Recommendation 4: The Global team should produce, for all Global products, standardised guidance on the roles and responsibilities of different stakeholders within delivery, and their expectations for those products delivered. This should be shared and agreed with delivery

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[60] As mentioned previously, the implications of this for the ability of the Global programme to achieve its intended outcomes should be explored as part of an impact evaluation.

partners, to ensure awareness and understanding. This guidance could include recommendations on delivery processes and best practice.

Recommendation 5: The Global team should take a more active role in monitoring product delivery to increase accountability and help ensure product quality. This could include monitoring application rates, systemically collecting end-of-product delivery reports (with lessons learned) from delivery partners, and organising knowledge sharing sessions with delivery partners to facilitate sharing of knowledge and best practice.

5.2   Coordination across products

Products can work well together to support strategic aims, but delivery partners would prefer more sight of the overall programme and the context for their product

Stakeholder groups reported that the overall Global offer provided a range of opportunities that could be deployed in different combinations and at different points in time to support a strategic aim. Partners do not expect all companies to go through each product, but aim to ensure businesses utilise the products as and where needed to address any gaps they have.

Partnership managers, domain leads and an international partner were all able to point to instances where products had interconnected effectively – for example, a GBIP following on from a GEM, or a CR&D opportunity following on from a GBIP. Domain leads also cited instances where the Global Team had joined-up their knowledge of CR&D application levels and focus to make suggestions for where GBIPs may be appropriate. Some businesses were also positive about the coordination across products, with some highlighting the value of GIP or Global Explorers following on from a GBIP.

Partnership Managers and some of the delivery teams noted that when businesses go through the process of GBIP to GIP to CR&D they do think they see the best outcomes; although delivery teams noted that this can be dependent on the business and the level of work they put into their experience and exploiting this.

> "I think we see some really good progression from companies that start off going on the GBIP move to the GIP and then progress on to various other sort of partnerships, collaborations, competitions and things, and you can definitely see that journey coming through. Companies that haven't been on the GBIP and come straight onto the GIP, they've got a bit of catching up to do if you like, but they can still get as much out of it as companies that have been on the GBIP. It just takes them longer to get up to speed and to get into it. As long as they put the effort in, they'll still get the same out of it." - GIP Delivery Team Member

> "It's kind of a like a flexible continuum. So it sort of goes up and down, from an expert mission up to CR&D, maybe a Global Incubator programme and then back again." - Partnership Manager

However, there is limited systematic evidence on where products had inter-related, either in terms of design being aligned to support a strategic objective, or in terms of participant progression between products. Processes do not currently seem to capture if or where this has occurred (or whether this was intended). There was the impression among the Global team that this information sits in people's heads, rather than bring written down.

While products can work well together, there was a sense from all delivery partners that more could be done to increase interaction and understanding between the teams (including both the delivery teams and the Global team) to ensure that products align better. Delivery partners wanted greater sight of the overall programme and how their products fit both against overarching strategic objectives, and within the overall programme offer. They thought this would help them maximise benefits for businesses.

> *"The commissioning process in terms of how priorities filter down and are translated into GEMs and GSWs is probably not always that clear. So the mandate we get can come from sort of many different sources, sometimes it might come through the Global Missions Programme manager, it might come through Innovation Leads, it might come through Partnership Managers at Innovate UK. So I think part of our role is actually getting everybody together and on the same page because often that process has not actually happened internally within a bit within Innovate UK before it actually arrives at Business Connect."* - Business Connect Delivery Partner

> *"I would say it's a dark art and we haven't got a clue. We get a call saying would you like to run this GIP in this sector in this location at this time and we say yes and that's about as much as we know."* - GIP Delivery Team Member

These findings suggest a couple of recommendations, which align with recommendations made for the individual products (GEM, GBIP and GIP) discussed in Chapters 4.1, 4.2 and 4.3:

Recommendations 1, 3, and 5: The Global team should produce overarching strategic plans that set out the objectives for planned products, and particularly how these are designed to interact and support each other. Data on delivery experience (e.g. application levels and lessons learned from delivery) should be systematically collected and examined with reference to the objectives and expected interaction of products.

Recommendation 3: The Global team should work with delivery partners to increase the flow of information on the context around products. This could include: sharing strategic plans (recommended above); holding product initiation meetings with stakeholders to provide the context for products and proactively highlighting to partners where products relate and are intended to work together to support a particular aim; building and disseminating a standard repository of GEM reports and other product delivery reports.

5.3   Ensuring learnings are reflected in programme delivery

Ongoing learning and programme improvement takes place across all global products, but more coordination and information sharing would be welcomed

Both senior stakeholders and delivery partners flagged that learning from the delivery of products is ongoing. They were able to highlight specific instances of where improvements had been (or are being) made, based on reflections on previous delivery. For example, the Global Explorers programme has been paused for new applications since July 2024, to allow for improvements to processes to take place. There are also some examples of learnings from a previous evaluation being implemented. For example:

■   It is understood that Business Connect are in the process of developing detailed guidance on the commissioning, planning and delivery processes and for their products, including GEMs and GSWs. This is in response to the previous evaluation recommending greater consistency in the scoping of GEM.

■   The previous evaluation recommended arranging face-to-face meetings for the GEM delegation prior to the mission. Survey evidence indicates this has been implemented for some (albeit not all) GEMs (see Section 4.1).

However, in some cases opportunities for improvement have been identified but not yet implemented. Recommendations from the previous process evaluation that do not appear to have been addressed include, for example:

■   Improving communication between GEM and GBIP delivery teams, so relevant GEM learnings can aid planning of GBIPs.

■   Enhancing follow-up activities for GEM participants and dissemination of GEM findings.

■   Improving standardisation of GBIP selection criteria.

■   Providing information on in-market contacts and an opportunity for participants to have input into their selection during the GBIP preparation phase.

In addition, Business Growth partners have previously identified the need for standardised guidance and templates. However, despite calls for this, such standardised guidance has not yet been forthcoming.

> *"There isn't that clear guidance from anybody saying…'this is what you should be doing' and we have been promised guidance for a long, long time around quite a lot of this, and it hasn't yet materialised. I do actually feel that some of us who have been delivering GBIPs for a very long time probably could add a lot of value into that, but we haven't really been approached to discuss that"* - GBIP Delivery Team Member

> *"We are constantly looking in terms of how do you put in place processes to try and ensure as much consistency as possible? But it always surprises me whenever we do that you never really get any more consistency in my experience. Even with working with one*

organisation you can work with different people in an organisation/partner and you get a very different experience from that product, how it's delivered." - Partnership Manager

There are also some opportunities for learning that exist, but which have not been exploited. For example, GBIP delivery partners are expected to produce end of GBIP reports that include lessons learned from delivery. But these reports have not been collected or interrogated by the Global team to date.

Overall, senior stakeholders and delivery partners would welcome more coordination and opportunities to share learning about what works well both between different delivery partners, and across products. It was noted by GBIP delivery teams that some opportunities to do this had previously existed, but these were no longer taking place.

> *"We did used to have a meeting around sharing good practice, but actually it just materialised into everyone talking about the challenges that they were facing in their GBIPs, which wasn't really the purpose of the meeting and then eventually they just got cancelled. So I think it has to be very controlled in terms of what would be discussed in those meetings."* - GBIP Delivery Team Member

Partnership Managers also wondered if there was further opportunity for re-structuring their own team, as they noted they do not always get opportunities to communicate and share knowledge. Partnership Managers also believed improvements could be made in how they work with Domain Teams to ensure more consistency in how they work together, and share learning and planning here.

These findings together suggest a recommendation which aligns with recommendations made in respect to GBIPs and GIPs in Chapters 4.2 and 4.3 (recommendation 5):

Recommendation 5: The Global team should take a more active role in monitoring product delivery to increase accountability and help ensure product quality. This could include monitoring application rates, systemically collecting end-of-product delivery reports (with lessons learned) from delivery partners, and organising knowledge sharing sessions with delivery partners to facilitate sharing of knowledge and best practice.

In addition, to help ensure that learnings from this process evaluation feed through into desired actions in a timely way, it is suggested that the Global team review the recommendations of this process evaluation and record an internal response setting out planned actions and associated timeframes.

6 Findings – Theme 4: Engaging stakeholders

The final evaluation theme focusses on engaging stakeholders, with an overarching evaluation question "To what extent, and how effectively, have processes involved stakeholders with the Global core programme?".

Key findings:

Domain leads are positive about their engagement with the Global team. Several stakeholders thought that the Global team could leverage engagement with Innovate UK more strongly, to promote the Global programme and advertise its products.

Engagement with government departments is mixed. Stakeholders believed that engagement with some departments was mostly good (with DBT, DSIT, and DfT mentioned as positive examples – but there was some variation in these, for example it was mentioned that DBT may have better understanding of the offer than DSIT), with additional ad hoc products being commissioned, but that on the whole engagement with central government was too reactive.

There is **varying awareness of Global products among businesses**, with CR&D opportunities generally being the most recognised. Delivery partners and Global team members highlighted a need to expand methods for advertising and recruiting to GBIPs and GIPs.

Communications with businesses need to be clear and consistent to ensure appropriate understanding of the scope of and objectives of Global products.

6.1 Engagement within Innovate UK and with government stakeholders

Innovate UK domain leads reflected positively on their engagement with the Global team

Domain teams were generally positive about the timing and nature of their own engagement with the Global team and the interactions they have had.

However, some Global Team members thought the team profile could be higher within Innovate UK. In particular, there was a view that there could be greater emphasis on the positive role they have in supporting domestic sectoral agendas and that this may be underappreciated currently. There was sometimes a sense that engagement with other teams within Innovate UK could happen at a more senior level, which would generate more support for the Global agenda.

> *"The relationship with the domain teams is critical, but it's very personality driven. If you know the right person in the right team that is really helpful to open the doors, to speak to them. I think I'd like to see a lot more engagement at a slightly higher level with the with global being a feature that is being more pushed on the teams to consider it as part of their planning because I don't know that that happens across the board. If we featured more heavily at a higher level in the domains rather than us going straight to innovation leads, then we'd get more traction quicker."* - Partnership Manager

Most stakeholders, delivery partners, and businesses thought that more could be done to communicate the Global product offer both across Innovate UK and more widely to encourage more awareness of their resources, enable further promotion of product recruitment activities, and provide links to other products and funding.

Engagement with government departments is mixed, but where there is awareness this can lead to positive links and increased activity

Senior stakeholders (including the Global Management Team, Partnership Managers, and Domain Leads) believed that awareness of the Global Team's offer was variable across Government departments. For example, it was seen as stronger in the Department for Business and Trade than in the Department for Science, Innovation and Technology (although the team worked with both these departments).

Domain Leads noted that the Global team are good at introducing the concepts and communicating these to departments (particularly DBT and DSIT). However, they believed that typically awareness tended to be higher where departments had engaged with a higher number and range of products, or where representative from departments had attended product visits and events.

> *"They had good familiarity with our global products and services and could see first-hand the value in doing them as well as give policy insight which is great. So thoroughly recommend if you ever get a policy person on one of those, it's a good idea."* - Domain Lead

Where awareness was strong, in some instances departments had gone on to fund additional GBIPs.

However, some delivery partners reported that engagement with government was often reactive and that more could be done to engage departments more consistently, and in a way that was more clearly aligned with product objectives.

The focus of stakeholder feedback also tended to be around departments that the Global team did engage with: primarily DBT and DSIT, and to a lesser extent DfT and the Foreign, Commonwealth & Development Office (FCDO). It would be valuable for the Global team to actively consider whether this is the full set of potentially relevant government departments. If not, it would be worth building relationships with wider government departments to raise awareness and understanding of the Global programme.

Recommendation 7: The Global team should establish regular meetings with relevant government departments on a consistent basis to update on the planned Global programme and build connections. Relevant government stakeholders should be invited on GEMs and GBIPs where possible and appropriate, to build a depth of understanding of the products offered and impacts of these.

6.2 Engagement with businesses

There are varying levels of awareness of Global products among businesses, with CR&D opportunities generally being the most recognised

Awareness of the different Global products among businesses varies. Table 6 presents the share of survey respondents who are aware of the other global products. In general, CR&D competitions appear to be the most visible global offering. Awareness of CR&D ranges from 42% of GIP survey respondents to 66% of GBIP survey respondents. Awareness of GBIPs and GIPs among CR&D survey respondents in contrast is much lower – at 38% and 14% respectively. Global Explorers appears to be the least visible product, with awareness ranging from just 10% among CR&D survey respondents to 53% among GBIP respondents. However, it is also the newest Global product.

Table 6   Business awareness of Global products

		Which, if any, of these Innovate UK programmes are you aware of?					
		GBIP	**GIP**	**Global Explorers**	**Eureka**	**CR&D**	**None mentioned**
Programme participated in / applied to	**GEM**	68%	35%	18%	41%	65%	12%
	Eureka*	41%	24%	18%	47%	65%	24%
	CR&D	38%	14%	10%	44%	57%	25%
	GBIP	-	54%	53%	46%	66%	11%
	GIP	75%	-	47%	33%	42%	6%
	Global Explorers	46%	40%	-	48%	52%	22%

Source: *Frontier Economics based on own survey data.*

Note: *Question = "Which, if any, of the following other Innovate UK programmes are you aware of? Please select all that apply." Note, as part of this Eureka / CR&D survey participants were asked if they had heard of other 'other' Eureka / CR&D funding competitions.*

Base = 36 [GEM]; 17 [Eureka]; 83 [CR&D]; 96 [GBIP]; TBC [GIP]; 50 [Global Explorers], excluding any survey respondents who answered "Don't know" or "Prefer not to say".

*The sample size for Eureka is low (17), and so results must be interpreted with caution.

This aligns with the feedback from businesses who participated in focus groups. For example, GIP participants engaged qualitatively noted there is mixed awareness among businesses of

the different products, with one have also attended GBIPs, another having also take part in Global Explorers, but others not being aware of these.

> *"Just on Global Explorers, why is it so secret? Why is it hidden? Why isn't it just like available as an ongoing thing for people to access with clear instructions? Every time someone talks about it, someone else will say 'that's the first time I've ever heard about it."*
> - GIP Participant

Methods for advertising and recruiting businesses to some Global products should be expanded

Senior stakeholders and delivery partners discussed a somewhat limited reach for recruitment to some products, and in particular GBIPs and GIPs. This is noted in sections 4.2 and 4.3. GBIP delivery focus group participants believed that more communication and engagement activity was needed to expand the pool of participants – particularly enhancing links between Business Connect and Business Growth partners.

Survey participants for all products (except GEMs, where individuals are invited to take part), were asked how they heard about the product offering. Figure 15 presents the results for the main answer options (note that businesses can report more than one answer). There are clear differences in the way businesses find out about the different products. The most common way CR&D survey respondents heard about their competition was via Innovate UK's website (51%). This contrasts quite heavily with Global Explorers, GBIP and GIPs, where the majority of respondents heard about the programme through an IGS. This is quite a narrow channel of communications, as it necessitates prior involvement with Innovate UK.

Given CR&D appears to be the most widely known offering across all survey respondents (see Table 6), this could indicate that the Innovate UK website may be an effective marketing tool to promote other offerings and, in particular, help widen the net for GBIP recruitment.

> *"We have a very good central resource for the competition funding. It's a pity there couldn't be a link from that, 'by the way, do you know about this? Go and look at GBIPs if you're interested'."* - Domain Lead

Figure 15   How did you hear about this programme / funding competition?

Communications with businesses need to be clear about the scope and objectives of the Global products

Delivery partners thought there needs to be more clarity in communicating the different products, so businesses understand the differences between each offer and what is required (particularly around finances) and what their objectives are. This accords with the findings in Sections 4.2 and 4.3 that businesses thought they are not always fully aware or accurate in their understanding of the objectives of the products and what is involved.[61]

As such, the processes for communicating product offers to businesses might be improved to:

■ Remove any confusion regarding activity purpose (for example the difference between Global products and trade missions).

■ Raise awareness of the overall programme offer, opportunities available, and how they interrelate. This may increase businesses progression into and use of wider programme products.

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[61] This should be explored further through impact evaluation, as this could be a potential barrier or hindrance to Global products having the full benefits intended for participating businesses.

These findings prompt several recommendations, which build on recommendations made in respect to GBIPs and GIPs in Chapters 4.2 and 4.3:

Recommendation 10: The Global team should explore ways to expand recruitment for GBIPs and GIPs. This could include greater promotion of these products via the Innovate UK website and contacts lists, linking information about GBIPs/GIPs to relevant CR&D competitions, or greater marketing of opportunities through industry groups or local growth hubs outside the current Business Growth network.

Recommendation 4: For all Global products, the Global team should provide and establish awareness and understanding of standardised guidance on the scope and objectives, to ensure that delivery partners and other stakeholders communicate these consistently to businesses who may wish to participate.

7 Conclusion

The findings summarised in Chapters 3 to 6 indicate that overall the Global team delivery processes, and those of their delivery partners, work well. There is a high degree of satisfaction from stakeholders, including supported businesses.

There are some common themes for areas of improvement, however. The main two relate to: greater transparency and information sharing around strategic objectives and decisions; and reducing the variability of product experience and quality. There are also some recommendations around raising awareness and engagement among stakeholders. Finally, there are some suggested process-related improvements for specific Global products.

The recommendations are synthesised and summarised here.[62] It is suggested that the Global team review these, and internally agree any planned actions with associated timeframes. This will help ensure that learnings feed through into desired actions in a timely way.

Recommendations to increase transparency and information sharing around decisions and strategic objectives

Recommendation 1: The Global team should produce overarching "Country Plan" for each country of interest. These should be evidence based and set out: the objectives for engagement with that country, the relevant context (including any constraints faced), and the planned products and timing of those products. These plans could be shared within the Global team and other stakeholders as appropriate, to increase institutional memory and wider understanding of the Global team objectives. The plans should be updated as necessary over time – for example, if planned products or contextual factors change.

Recommendation 2: The Global team should produce a record of key decisions made – such as when a particular instance of a product is decided on. This should record standard information, such as the key motivations and relevant decision factors. Producing such records after decisions are made (rather than as part of the approvals process) is a pragmatic approach that seeks to maintain flexibility and speed of decision making, while still increasing transparency, institutional memory and accountability.

Recommendation 3: The Global team should work with delivery partners to increase the flow of information on the context around products. This could include:

- sharing strategic plans (that set out the context and objectives for planned products);
- holding product initiation meetings with stakeholders to provide the context for products;
- proactively highlighting where products are intended to work together to support a particular aim; and

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[62] Note recommendations presented here are summarised and categorised by theme, so did not appear in the same sequential order in the findings chapters of the report. However, they are numbered consistently throughout, for purposes of clarity.

- ▪ sharing feedback with delivery partners on the learnings from products delivered and how these have (or have not) been used to inform other product decisions.

Recommendations to reduce the variability of product experience and quality

Recommendation 4: The Global team should produce, for all Global products, standardised guidance on the scope and objectives, the roles and responsibilities of different stakeholders within delivery, and Global team expectations for product delivery and outcomes. This should be shared and agreed with delivery partners, to ensure awareness and understanding. This guidance could include recommendations on delivery processes and best practice.

Recommendation 5: The Global team should take a more active role in monitoring product delivery to increase accountability and help ensure product quality. This could include monitoring application rates, systemically collecting end-of-product delivery reports (with lessons learned) from delivery partners, and organising knowledge sharing sessions with delivery partners to facilitate sharing of knowledge and best practice.

Recommendations to raise awareness and engagement with stakeholders

Recommendation 6: The Global team should disseminate the findings of GEMs more widely and persistently. This could include promoting to relevant industry groups and government stakeholders, both when a GEM report is published, and when current events or inquiries make it relevant. The repository of GEM reports should be better advertised, both within Innovate UK and externally. For example, relevant GEM reports could be signposted alongside other product opportunities.

Recommendation 7: The Global team should establish regular meetings with relevant government departments on a consistent basis to update on the planned Global programme and build connections. Relevant government stakeholders should be invited on GEMs and GBIPs where possible and appropriate, to build a depth of understanding of the products offered and impacts of these.

Recommendation 8: The Global team and product delivery partners should agree red-amber-green lead-in-times for delivering ad-hoc products that can be clearly communicated to external stakeholders. This would help manage expectations and ensure product quality.

Additional recommendations specific to GSW and GEMs

Recommendation 9: There are small improvements that could be made to GEM delivery processes (or that could be implemented in a more standard way across GEMs), including:

- ▪ More consistently utilising Domain Lead knowledge and expertise to inform the recruitment of GSW and GEM participants.

- Engaging sector experts more in programme and agenda planning, giving more advanced sight of agendas, and building more informal networking opportunities into in-country visits.
- Using recording and transcription technology to streamline note-taking processes.

Additional recommendations specific to GBIPs and GIPs

Recommendation 10: The Global team should work with delivery partners to expand recruitment methods for GBIPs and GIPs. This could include greater promotion of these products via the Innovate UK website and contacts lists, linking information about GBIPs/GIPs to relevant CR&D competitions, or greater marketing of opportunities through industry groups or local growth hubs outside the current Business Growth network.

Recommendation 11: There are some small improvements that could be made by delivery partners (or implemented in a more standard way) across GBIPs and GIPs, including:

- Providing clearer information on the scope and objectives of the products (and activities).
- Providing information earlier on cohort participants and market visit agendas.
- Tailoring preparation workshop content to experience level and including interactive content.
- Limiting the inclusion of long-duration events on visit agendas, and maximising industry and investor networking opportunities.
- Using strategic development plans more consistently throughout the programme.
- Increasing opportunities for peer-to-peer networking and learning within and across cohorts.

Additional recommendations specific to Global Explorers

Recommendation 12: The Global team should work with the Global Explorers delivery partner to ensure that application processes have been clarified and sped up. This includes: switching to an online application; clarifying roles and responsibilities (e.g. who has authority and responsibility for answering enquiries); and determining appropriate communications and strategies that can implemented if applications are greater than anticipated.

Recommendation 13: The Global team should agree with the Global Explorers delivery partner a simplified claims procedure that is more proportionate for the size of the programme and claims being made by businesses. This could include automatic authorisation of claims within certain thresholds or certain types of expenditure, on production of valid receipts. The requirements for multiple quotes or for sight of bank records should be dropped.

Additional recommendations specific to CR&D

Recommendation 14: The Global central team should provide support to the partnership managers to navigate the approvals gateway process and set up CR&D competitions. This would increase efficiency and free up partnership manager time.

Annex A The Innovate UK Global programme

Programme overview

The Global team core funding is used to support innovative UK businesses to achieve faster growth and scale, by enabling their international engagement. There are various 'products' funded, that seek to (i) help identify relevant international opportunities, (ii) get businesses ready for global growth by building capability, capacity and networks, and (iii) enable innovation partnerships with counterparts from other countries. An overview of the current products provided by the Global team using core funding is provided in Figure 16.

Figure 16 Overview of Innovate UK Global team products and services
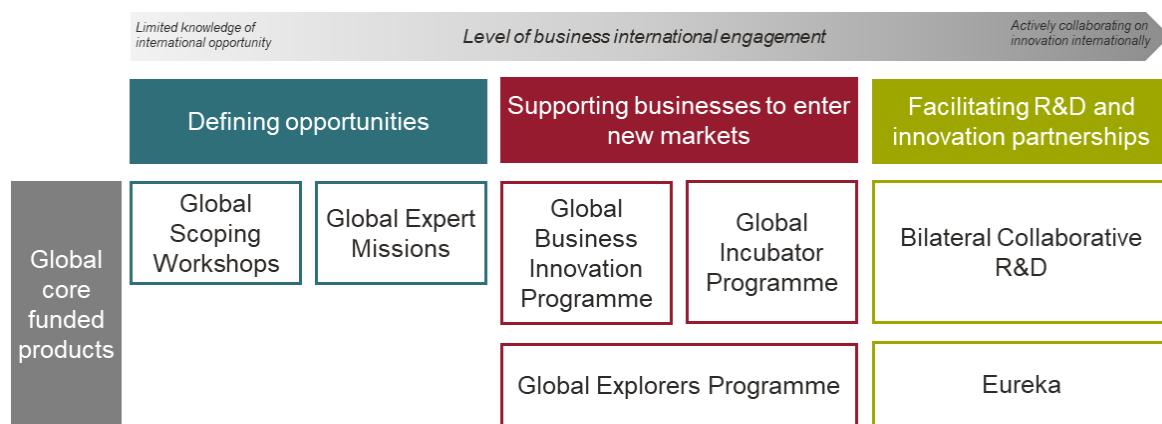
Source: Frontier Economics

A brief summary of each of the products is given below.

Some of the products are new products made possible by the expanded resources available for the Global core programme since April 2022. Others are products that existed previously, but where the scale and/or scope has been increased by the additional core funding that the Global team now has at its disposal.

Defining opportunities

The products that seek to help identify relevant international opportunities are delivered by Innovate UK Business Connect.

- **Global Scoping Workshops** (GSW). Each GSW is a workshop bringing together businesses, researchers and other organisations in specific technology and sector areas to help Innovate UK teams identify countries offering the best prospects for partnership and collaboration with the UK. These are a new product in the current spending review period, introduced to provide earlier stage input to inform the targeting of GEMs.

■ **Global Expert Missions** (GEM). Each GEM is a group of 6-8 experts who help scope and identify opportunities for UK businesses in specific countries and technology or sector areas. It involves a week-long international visit, followed by dissemination reports and a workshop. GEMs existed as a product before the current spending review period, but are an <u>expanded product</u> with the number of GEMs being conducted increased as a result of the uplifted core budget.

The Business Connect team is also developing smaller supporting (earlier-stage) activities, including short 'Market Research' pieces that horizon scan in a particular area, and 'Discovery Visits' whereby a small group of Innovate UK colleagues would visit a country in advance of developing a full GEM in that location. These activities have not yet been launched, and so evaluation of the delivery processes for these activities is not in scope of this evaluation.

Supporting businesses to enter new markets

The products that seek to support businesses to enter new markets are delivered by Innovate UK Business Growth delivery partners.

■ **Global Business Innovation Programme** (GBIP). Each GBIP is a cohort of around 15 innovative high growth businesses exploring global opportunities and building collaborations and partnerships in a specific country and technology or sector area. Each GBIP runs over 9-12 months, with a preparation phase, a week-long visit to an international market, and an exploit the opportunity phase. GBIPs existed as a product before the current spending review period but are an <u>expanded product</u> with the number of GBIPs being conducted increased as a result of the uplifted core budget.

■ **Global Incubator Programme** (GIP). Each GIP is a cohort of around 8 innovative high growth and scaling businesses building long-term relationships and foundations for future market access and growth in a specific country and technology/sector area, working with a leading international incubator. Each GIP runs over 12-18 months with a preparation phase, a 4-6 month virtual programme with the incubator (including 2 country visits), and then an exploitation phase. This is a <u>new product</u> in the current spending review period, developed to provide a 'next step' for businesses after a GBIP or support for businesses already too developed to benefit from a GBIP.

■ **Global Explorers.** This product offers grant funding to UK SMEs of up to £21,000 together with IUK Business Growth support from an innovation and growth specialist for projects that help SMEs explore global R&D and innovation opportunities to accelerate the development of their innovative ideas, products and services, and accelerate global market access. This is a <u>new product</u> in the current spending review period introduced to support businesses with ambitions to further explore international opportunities.

Facilitating R&D and innovation partnerships

The products that seek to facilitate R&D and innovation partnerships through collaborative R&D are delivered by Innovate UK.

- **Bilateral Collaborative R&D.** Grant funding programmes to fund UK businesses (and research organisations) to undertake R&D projects with counterparts from an organisation (business or research organisation) in a partner country. CR&D calls may be focussed on a specific sector, technology area or theme, or be open scope – as agreed with the partner country. This is a new product in the sense that, while the Global team did previously run CR&D competitions, these are now funded through the core budget, rather than other funding streams. As a result, the Global team has greater control over where and how this funding is deployed. In particular, funding can be targeted to focus on the development of UK businesses rather than focusing on generating outcomes for developing countries as is the case for R&D grants funded using ODA funding streams.

- **Eureka.** Eureka is an international network for collaboration in R&D. Innovate UK is the UK funding body that is a member of the Eureka network and participates in Eureka programmes including Eurostars, Clusters, and Globalstars. Funding for Eureka engagement now comes out of the Global core budget, but similar funding was available prior to the current spending review period, so this is a continuation of an existing product.

Programme budget allocation

It is helpful to understand the relative size (in terms of core budget allocation) of the different products. This is illustrated in Figure 17 on the basis of the current delivery plan. The total funding represented is £73 million over the period rather than £95.5 million, due to underspends in earlier years.

Figure 17 Global core budget allocation planned forecast

Global core budget by programme 2022-23 to 2024-25 (£ million)
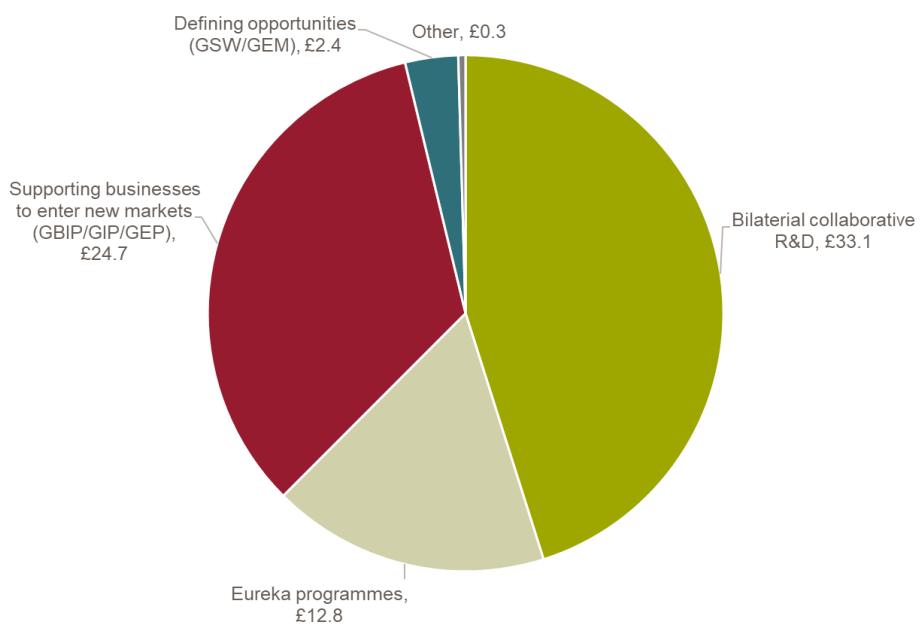
Note: Total sums to £73m due to underspend relative total available budget in 2022-23 and 2023-24.
Source: Frontier Economics analysis based on Global team delivery plan as of August 2024.

Bilaterial CR&D accounts for 45% of the core budget, and Eureka products another 17%. The products designed to support businesses to enter new markets (GBIPs, GIPs and Global Explorers) together account for 34%, while the products designed to help define opportunities (Global Scoping Workshops and Global Expert Missions) account for just 3%.

Programme organisation and delivery

The organisation of the global core programme team, and the delivery partners involved in delivering the core funded products, are summarised in Figure 17.

The Global team is led by a Management Team consisting of the Deputy Director, and the Senior Leadership Team. The Global team itself is organised on a largely regional basis, with one or two Country Relationship Managers responsible for managing Global activity (and wider relationship building) in each of 5 broad regions (North America, Europe, India, Asia and Australasia). However, there are also now 'product owners' allocated within the Global team – these individuals are (largely) drawn from the Relationship Managers, and have additional responsibility for supporting or managing the delivery of a particular core funded product. The responsibilities of product owners vary across the products. Some are relatively involved and more established (e.g. GBIPs) while others are newer and much less involved (e.g. bilateral CR&D). There is also a central programme management and support team.

In terms of governance, the Deputy Director of the Global team has ultimate responsibility for the management, resourcing, planning and budget of the core programme. The Deputy Director is supported by a Steering Board, which oversees the Global overarching programme (that includes both the core funded programme and other funded programmes managed by the Global team). The Steering Board meets every 12 weeks, and supports and makes recommendations on matters of stakeholder engagement and management, delivery, strategy and assurance. The Steering Board consists of the Global senior management team, members of the central programme management team, and representatives of Business Connect and Business Growth.

The Global core funded products, as mentioned in the descriptions of the individual products above, are delivered by various partners:

■ GSWs and GEMs are delivered by Innovate UK Business Connect.
■ GBIPs and GIPs are delivered by Innovate UK Business Growth delivery partners. There are around 12 Business Growth partners who deliver GBIPs, although 5 or 6 deliver the vast majority of all GBIPs. For the Global Incubator Programme, delivery also involves an international incubator organisation delivering the programme.
■ Global Explorers is delivered by a single Business Growth delivery partner: Exemplas Ltd.
■ The bilateral collaborative R&D and Eureka programmes are delivered by Innovate UK, in collaboration with the Eureka network and counterpart organisations to Innovate UK in partner countries.

Figure 18 Organisational structure
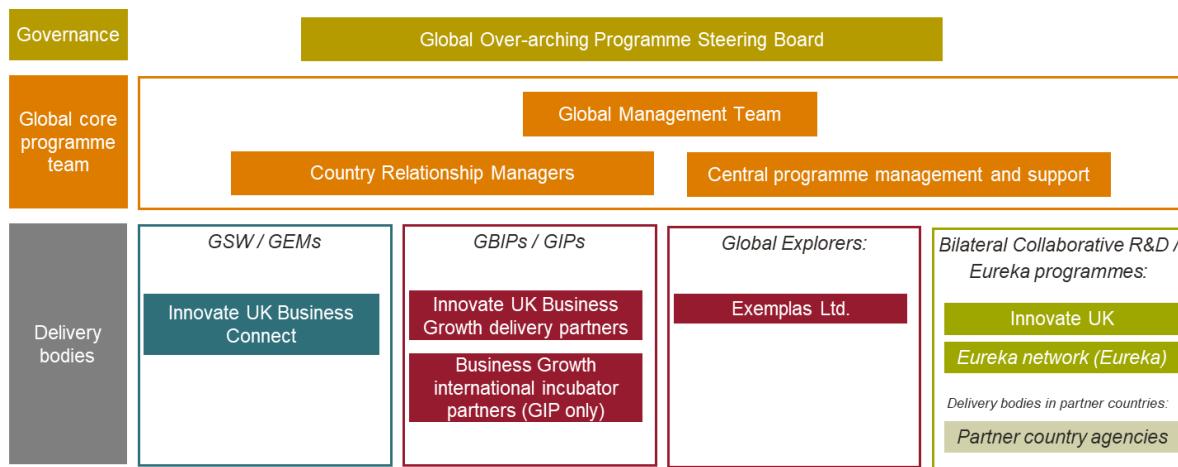
Source: Frontier Economics.

Process maps

Process maps summarise the key steps involved in planning, delivering, supporting and monitoring an intervention. Process maps are useful for supporting thinking around a process evaluation: they provide a clear description of the processes of the intervention and the parties involved in those processes, and help to give structure and ensure that the evaluation focuses on the right elements and obtains data from the right stakeholders.

As part of the evaluation framework design, process maps were developed for the 8 Global core funded products: GSW, GEM, GBIP, GIP, Global Explorers, Bilateral CR&D and Eureka programmes. These are presented in Figure X to X in Annex B. These illustrate the processes involved in delivering the products, and the stakeholders involved in each stage.

A key part of the delivery of the Global core funded programme is the strategic prioritisation of when and where the individual products will be deployed. There is no single formal process across the Global core programme as a whole that determines this (and hence no process map has been developed to illustrate this process). Figure 19 illustrates the key inputs into these decisions, but the timing and relative importance of these different inputs varies across products and over time.

■ An initial budget allocation was made across countries and products by the Global management team. This was based on countries that Innovate UK wanted to prioritise for engagement, taking into account the suitability of countries' R&D ecosystems (e.g. whether bilateral collaborative R&D funding competitions would be possible) and the likely ability of counterpart organisations to match UK R&D funding (which is more limited in some countries than others). Internal delivery constraints (for example, how many CR&D competitions it was believed Innovate UK could deliver or how many GEMs Business Connect were thought to have the capacity to deliver) were also important.

■ Individual 'interventions' (i.e. a particular product being deployed in a particular location) are then developed over time by Global team members (Country Relationship Managers and Product Owners) and signed-off by members of the Global Management Team. This sign-off process has been recently formalised into an Approvals Gateway process. However, the process for developing and deciding to deploy individual interventions is still quite informal. It is informed by various factors, including:

   □ Innovate UK sector experts' input on opportunities and priorities. Due to turnover in individual Innovate UK sector experts, senior sign-off from within the Innovate UK domain team is now required in order to agree the deployment of GBIPs and GIPs.

   □ Country Relationship Managers' understanding of opportunities and priorities.

   □ Memorandums of understanding that have been established with partner countries. These are negotiated by Country Relationship Managers, and set out multi-year agreements on what type and level of Global product activity will take place in a particular country over the next several years.

   □ Feedback from the delivery on other products. For example, a GSW might be designed to support a future GEM, or a GEM might be designed to explore a market in advance of running a GBIP. GIPs were developed to some extent as a next step after GBIPs, while CR&D competitions might be developed as a next step in an area (country/sector) where successful GBIPs or GIPs have been conducted. Conversely, a CR&D competition might reveal business applicants are not yet in a suitable position to make the most of the CR&D opportunity, which may prompt development of a GBIP or GIP to support businesses at an earlier stage.

   □ Delivery constraints are also a factor. For example, there may be limited space in the Innovate UK competition calendar to deploy a CR&D competition at a particular moment in time. Or, while it might sometimes be desirable to run a GEM in support of a future GBIP there may not always be time given planned delivery timescales.

Figure 19 Process for determining when and where Global products are deployed

Source: Frontier Economics.

Annex B Global product process maps

Figure 20 Global Scoping Workshop Process Map

Global Scoping Workshop					

Planning phase - 6-8 weeks

Workshop phase - 1 day

Post-delivery phase - 2-3 weeks

GSW initiated & technology area and country selected

Start planning workshop

Identify & recruit between 10 - 20 participants

Survey potential participants

Deliver Global Scoping Workshop

Produce internal summary report for sector team

Includes regular planning calls and producing briefing / scope document outlining context and goals, etc.

Identify experts from across SMEs, large enterprises and also potentially academics, policymakers, and Catapult network representatives. This is based on expertise, experience of international collaboration, geographical spread and ED&I considerations

(6 weeks prior to workshop)

Online survey focused on international collaborative priorities and appetite to attend workshop

Online or in-person Includes discussion of survey results; experience of working internationally; bilateral activity recommendations, etc.

Report summarises survey results and workshop findings in bullets; max 10 pages

Sign-off report

Recruitment mechanisms: IUK and Business Connect networks (incl. applicants to other programmes); ED&I team networks; other networks (e.g. UK Black Business Network); Linkedin, etc.

Track ED&I

Stakeholder Key:
IUK Innovation Lead / Domain team
IUK Global team (incl. country partnership manager)
Business Connect team

Source: Frontier Economics.

Figure 21 Global Expert Missions Process Map

Global Expert Missions

Planning phase - 3-6 months	Visit phase - 1 week	Post-visit phase - up to 6 months post-visit

GEM initiated & technology area and country selected

Start planning GEM (e.g. agenda & logistics)

Includes regular planning calls and producing briefing / scope document outlining context and goals

Select and brief technical writer

Acquire support from in-country partner- e.g. to check suggested dates / locations of visit. In-country partner could be from UKRI / DBT overseas offices, SIN teams or in-country external organisations / consultant (if other support unavailable).

Update UKRI, FCDO and DBT colleagues throughout development and delivery even if they do not provide direct support.

Identify & recruit between 6-8 delegates

(3 months prior to visit) Identify experts from across SMEs, large enterprises and also potentially (based on GEM needs) academics, policymakers, and Catapult network representatives. This is based on relevant knowledge and expertise, experience of international collaboration, geographical spread, ability to represent chosen area (not just own interests), time commitment requirements, and ED&I considerations

Recruitment mechanisms: IUK and Business Connect networks (incl. applicants to other programmes); ED&I team networks; other networks (e.g. UK Black Business Network); Linkedin, etc.

Track ED&I and conduct equality impact assessment of GEM programme

Brief delegates

Includes providing mission brochure, logistic doument, and hosting briefing webinar

Finalise & promote GEM

Conduct GEM market visit

Can involve site visits, 1-to-1 local stakeholder meetings, roundatable discussions and workshops, etc.

Hold daily wash-up session (and internal wrap-up workshop on last day) to collect delegate insights and feedback on GEM

Survey delegates

Within 4 weeks post-visit

Survey focused on quality and content of GEM

Produce confidential, internal report on GEM

Within 2 months post-visit; using standard Business Connect template

Circulated within IUK and previously agreed other relevant gov stakeholders

Produce & publish public (redacted) report on GEM

Within 3 months post-vist

Remove names, funding numbers and recommentations; and set out potential opportunities for UK businesses

Ensure political sensitivity of content

Plan, promote & deliver dissemination event

Delivered around 3-months post-visit

Short public events, either online or in person; presents GEM findings and experiences, and provides next steps

Hold internal 'Lessons learned' meeting

Within 2 weeks of report publication

Take foward agreed actions

Sign-off reports

Stakeholder Key:
IUK Innovation Lead / Domain team
IUK Global team (incl. country partnership manager)
Business Connect team
Technical writer
In-country partners teans

Source: Frontier Economics.

Figure 22 Global Business Innovation Programme Process Map

Global Business Innovation Programme (delivery - 12 months)

Planning phase

GBIP initiated & technology area, priority country and business growth partner selected

Hold kick-off meeting (& regular meetings throughout)

Recruit & select up to 15 UK SMEs to participate

Plan & promote GBIP

Can be follow-on from GSW / GEM; or based on identified priorities, market intellegence, relationships, stratgic agreements / memorandums of understanding with priority countries, etc.

6-8 week period - SMEs apply on IUK website, and are selcted by a panel

Criteria includes fit with scope & market and innovation & development level, etc., and financial checks

Collect monitoring data on applicants & participants

Get ready phase - 3-4 months

Allocate SMEs to an IUK BG innovation and growth specialist

Develop strategic work / action plan with SME participant

Deliver 2-day Get ready workshop

Involves sector and market experts, e.g. on business culture, IP, etc.

Log updates on CRM system

Visit phase - 1 week

Conduct GBIP market visit

Includes engagement with potential partners / collaborators and activities / meetings, etc.

Post-visit exploit the opportunity phase - 6+ months

Deliver 1-day exploit the opportunity workshop

Continue supporting SMEs

Survey SME participants for feedback

Produce GBIP final report

Includes helping to develop and implement action plan

Log updates on CRM system

Interaction with central Global team processes:

Planning and approval

Sign-off of initiation required by senior manager in Innovate UK Domain, and GBIP Programme Manager / country Partnership Manager

Ongoing management and reporting

Ongoing dialogue between Global team and partners through programme management platform to update plan, change, issues

Post-visit report of participants on-visit sent to Impact Manager and Programme Manager to add to secondary funding / Common Data Environment

Impact

Impact survey sent directly to participant, capturing IMF-consistent metrics, coordinated with Growth Partner final report

Stakeholder Key:
IUK Global team (incl. country partnership manager)
IUK Innovation lead / Domain team
Business growth partners
Overseas team (e.g. SINs)
IUK BG innovation & growth specalist

Source: Frontier Economics.

Figure 23 Global Incubator Programme Process Map

Global Incubator Programme (delivery - 12-18 months, annual)

Planning phase

GIP initiated & technology area, priority country and business growth partner selected

Kick off meeting (with regular meetings throughout programme)

Recuit & select (usually) up to 8 UK SMEs to participate

Plan & promote GIP

Can be follow-on from GBIP / GEM; based on identified priorities, market intelligence, relationships, stratgic agreements / memorandums of understanding with priority countries, etc.

6-8 week period - SMEs apply on IUK website, applications are shortlisted, interviewed and then selected

Criteria includes programme fit, ambition and level of inovation impact, etc., and financial checks

Collect monitoring data on applicants & participants

Preparation phase - 3-4 months

Allocate SMEs to an IUK BG innovation and growth specialist

Develop strategic action / development plan with SME participant

Deliver 2-day preparation workshop

Includes training, programme briefing, and overview of the innovation and sector landscape, etc.

Log updates on CRM system

Pursue phase - 4-6 months

Conduct GIP market visit 1

Deliver online training sessions

Conduct GIP market visit 2 - demo day

Culture & connections-focused

Local SIN team may attend some sessions

Weekly / fortnightly Includes consideration of technology and market fit, ecosystem, preliminary customer validation, IP, regulation, rountable discussions, intro to connections, etc., and involves mentor and experts

Showcase demo day - SMEs' present achievements and invite all new connections

local SIN team may attend some sessions

Hold regular team check-ins

SMEs could complete self-funded. in-market exploratory work, using incubator office as base

Post-visit exploit phase - 6+ months

Deliver online handover workshop

Continue supporting SMEs

Survey SME participants for feedback

Produce GIP final report

SMEs present work and feedback on programme impacts

Implement feedback (i.e. in other GIPs)

Some programmes' after-care / alumi support involves incubator for another 3 / 4 months

DBT may also run intro sessions

Feedback more process-based compared to handover workshop

Log updates on CRM system

Interaction with central Global team:

Planning and approval

Sign-off of initiation required by senior manager in Innovate UK Domain, and GBIP Programme Manager / country Partnership Manager

Ongoing management and reporting

Ongoing dialogue between Global team and partners through programme management platform to update plan, change, issues

Post-visit report of participants on-visit sent to Impact Manager and Programme Manager to add to secondary funding / Common Data Environment

Impact

Impact survey sent directly to participant, capturing IMF-consistent metrics, coordinated with Growth Partner final report

Stakeholder Key:
IUK Global team (incl. country partnership manager)
IUK Innovation lead / Domain team
Business growth partners
Overseas team (e.g. SINs)
IUK BG innovation & growth specalist
In-region Incubators
DBT

Source: Frontier Economics.

Figure 24 Global Explorers Process Map

Global Explorers (ongoing programme - 6 month project window)						
Access phase - 4 weeks +				**Delivery phase**		**Post-delivery phase**
GE open call is ongoing ●	Recruit SMEs and register their expression of interest (EoI) ● ●	Complete full application ●	Approve or dissaprove SME for grant ●	Grant awarded (up to £21,000, to cover up to 70% of cost) ●	Continue supporting SME through project ●	Recieve SMEs' end-of-project report ●
	SMEs must already be supported by IUK business growth. In particular aiming to recruit companies on High Growth Support (2,500 companies) or Scale-up (200) programme. Recruitment mechanisms includes individually sign-posting particular SMEs, e.g. by an IUK BG innovation & growth specialist, or following a GBIP or GIP	*Involves providing quotes for costings, such as hotels, & discussing any queries with business growth partners*	*No set number of recipients: do not need to rank applicants*	*SMEs cover rest of project cost (30%) - minimum project total amount is £10,000*	*Likely also provides support beyond GE programme*	*Focus on programme impacts / outcomes, and way it could be improved*

Approval criteria includes if project is in-scope (i.e. has an R&D instead of trade focus & appropriate country)

● Collect monitoring data from applicants & participants

Interaction with central Global team:

Planning and approval	Ongoing management and reporting		Impact
Authorisation Gateway: intial sign-off required before budget deployed to delivery partner		At the end of a period, a full list of GE projects that have been awarded goes to the Global team	Impact survey sent directly to participant, capturing IMF-consistent metrics

Stakeholder Key:
IUK Global team (incl. country partnership manager)
Business growth partners
IUK BG innovation & growth specalist

Source: Frontier Economics.

Figure 25 Bilateral CR&D Process Map

Source: Frontier Economics.

Figure 26 Eureka (Eurostars, Globalstars, Clusters and Networks) Process Map

Eureka (Eurostars, Globalstars and Clusters)

Planning & competition (call) phase

Funding call preparation, selecting theme / non-member country *(where relevant)*

Eurostars: open call

Globalstars: select non-member country to join consortium of Eureka countries

Clusters & Globalstars: select theme chosen (incl. if open)

Work to design the competition brief, eligibility and scope of competition

Funding call launched & advertised

Eurostars & Globalstars: 2 per year

Clusters: 1-2 per year for each of the 5 clusters

Choose budget to allocate for call & add specific UK criteria or funding priorities *(where relevant)*

IUK aim to fix budget allocation for each regular funding calls where possible over 7 year commitment period. Eurostars: always allocated £2.5m budget for each call; Clusters: commited £5m to each over a 3-year period

Competition must pass through authorisation gateway (involves providing an online business case)

If adding specific UK criteria to bottom-up Eureka call, must meet standard guidelines from Eureka

Advertise nationally

SMEs must meet 7 outlined eligibility criteria for Eureka & any additional UK criteria outlined by IUK.

Consortiums must be SME-lead, but larger businesses and research / academic organisations can be included

Selection phase

Complete legal viability and financial check of applications

Checks are based on applications on Eureka platform - if projects fail they cannot progress through the selection stage

Eurostars selection process

Rank project consortium applications during 2-stage devolved evaluation process

Recieve ranking list & declare funding for all projects within-budget

Funding must be declared based on rank order (only exception is if partner country counterpart cannot fund project)

Globalstars / Networks selection process

National evaluation of UK-side applications

National evaluation of partner country-side applications

Evaluation of joint consortium applications

Hold consensus meeting

Compare scores for each side of consortia, and negotiate which projects to fund

Clusters selection process

"Label" project consortium applications during 2-stage devolved evaluation process

Involves a project outline and full project propsal stage. Hold review meeting at end of each stage to determine which projects should proceed to next stage / become "labelled" (Cluster seal of excellence).

Hold internal consensus meeting to discuss funding labelled projects

Process always occurs, but only chooses which projects to fund if funding all labelled projects is out-of-budget. Discusses funding priorities, quality of applications and the public interest test

Take selected applications to funders panel for final sign-off

For assessing if IUK is happy to fund these projects

Post-awards decision & set-up phase

Manually bring UK-side of selected applications back in-house to IUK

Involves ratification questions to append Eureka application to innovate sytem, and converting currency figures from euros to pounds

Additional data collection and eligibility review

Request cost data from selected UK-side applicants and project finance team completes eligibility & viability review

Recieve combined partner finance form

Undergo pre-project / grant preparations

E.g. draw up collaboration agreements and grant offer letter; assign monitoring officers to projects and brief monitoring officers

Manually set up project on post-awards IFS system

Awards grants to selected UK-side applicants

Eurostars grant: up to EUR 360,000 per project partner Clusters: b/w £500k - £750k depening on cluster Globalstars: amount varies across calls

Recieve 25% Horizon top-up funding

Grant phase

Monitor projects (UK-side)

Performance monitored quarterly and reports uploaded

During and post-project monitoring (consortium)

Project consortium submits regular progress reports to Eureka Secretariat (and market impact reports for some calls, if successful)

Interaction with central Global team:

Planning and approval

Capture activity in central Delivery Plan to hold budget in forecasts (at minimum needs info of country, budget, and indicative start/end dates)

Write business case, to be approved by budget owner

Authorisation Gateway: intial sign-off required before budget deployed to delivery partner (start after business case approved, populate using business case content)

Ongoing management and reporting

Update programme team:

Send funders panel sheet to Programme Manager and Impact Manager

Programme Manager updates delivery plan to actuals (budgets, dates)

Impact Manager tags projects with country / theme / technology for Global 'Common Data Environment'

Impact

Portfolio reviews: Impact Manager collates and summarises monitoring officers' reports for Partnership Managers, and discusses in shared meeting to identify risks, issues, and impact

Stakeholder Key:
IUK Global team (incl. country partnership manager)
**IUK Innovation lead / Domain team**
Eureka team
Project finance team
Partner country IUK counterpart (i.e. funding agency)

Yellow boxes indicate external / international processes

Source: Frontier Economics.