SYN
BEE

D3.1 – A public – private synbio market players map

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1. SUMMARY OF ACTIVITIES FOR D3.1_ A PUBLIC – PRIVATE SYNBIO MARKET PLAYERS MAP IN THE SYNBEE PROJECT

This concise report outlines the efforts undertaken for D3.1_ A public – private synbio market players map in the SYNBEE project. It details the current strategies used to create a comprehensive map of these stakeholders. The report begins with an introduction to stakeholder mapping, followed by in-depth methods for identifying, analyzing, and engaging stakeholders throughout SYNBEE's duration through collaboration with partners. It also provides an update on the progress so far, including a visual representation of the initial mapping phase. Finally, it proposes the next steps and strategies to sustain the tool after the SYNBEE project end.

Importance of the Deliverable

Stakeholders are organizations with an interest in synthetic biology. Stakeholder mapping, defined as the process of identifying, categorizing, and prioritizing stakeholders (Reed et al., 2009), is vital for effective dissemination and knowledge transfer (Payne et al., 2019). For SYNBEE, a stakeholder map is essential to identify those who may be impacted by or have an impact on the project's activities. Once identified, connections can be established between stakeholders and the project team to engage the community into SYNBEE activities (events, pitch competitions, hackathons, training, mentoring, matchmaking, etc.). It can also ensure broad dissemination of findings and inclusion of diverse perspectives throughout the project.

Objectives of the Deliverable

This deliverable aims to:

- Create a comprehensive map of synthetic biology market stakeholders in Europe.
- Identify stakeholder groups to visually map them on an interactive and collaborative tool (AirTable) with the view of discovering potential synergies, interlinkages and

complementarities. The development of this kind of holistic and strategic tool will act as an inspiration and empowerment of new innovation, business and project collaboration opportunities, as well as to support better interconnections of European innovation ecosystems in the field of synthetic biology.

- Develop communication strategies to link SYNBEE consortium members with various stakeholder groups.
- Identify key stakeholders for ongoing engagement to facilitate communication planning throughout the project's lifecycle.

Expected outcomes

The intended outcomes of stakeholder mapping are as follows:

- A comprehensive list of stakeholders relevant to SYNBEE activities across Europe.
- Detailed information on each stakeholder, including type (SME, industry, research institute, university, investor, association), technology, sector of interest (health, energy, environment, food, etc.), location, brief description, website.
- A subset of stakeholders for SYNBEE consortium members to stay in touch with. A group of investors and industrial players to connect with emerging projects.
- An action plan for consortium members to engage stakeholders in SYNBEE activities.

Accomplished steps

- Conducted brainstorming sessions with each partner organization to identify relevant stakeholders across Europe.
- Appointed a representative from each partner organization to participate in stakeholder analysis.
- Delivered a comprehensive stakeholder map.

Next steps

Our upcoming actions include:

- Publishing the stakeholder map on the EUSynBioS website.
- Promotion of the map, allowing to attract more players to join the community.
- Keeping the map up to date as much as feasible.
- Progressively engaging in a deeper discussion with relevant stakeholders.

2. ABOUT THE SYNBEE PROJECT

SYNBEE is a European project coordinated by Da Vinci Labs. SYNBEE – SYNthetic Biology Entrepreneurial Ecosystem – seeks to enhance entrepreneurial and business skills of young professionals across Europe, specifically in the area of synthetic biology.

Our goal is to have academic community better trained in entrepreneurship, ready to start up and build companies in Europe, able to scale-up, internationalize, and create future unicorns in this highly commercially unexploited industry.

The objectives of SYNBEE are as follows:

- To facilitate students', researchers' exposure and access to industry & stimulate youth (self)employability in the field of synthetic biology.
- To support entrepreneurial education through programs designed in close collaboration with the private sector and business acceleration entities.
- To promote female talents in synthetic biology and STEM, provide them with knowledge and opportunities to contribute to the local private sector or develop their own businesses.
- Support local innovation ecosystems to scale-up and internationalize (across Europe and beyond) based on sustainable and inclusive growth.

- To improve flows of innovation resources between innovation ecosystems (physical mobility, but also remote access to positions/resources abroad), and to improve visibility of business opportunities across Europe, raise awareness of diverse business cultures across sectors and geographies.

The coordination, implementation, evaluation, and dissemination of SYNBEE activities requires the input of diverse groups, organizations, and individuals who stand to be impacted by SYNBEE. Notably, project dissemination requires a systematic approach to targeting key audiences and collaborators to ensure that insights gained from SYNBEE are transferred effectively to intended parties in a timely fashion. To maximize the impact of SYNBEE, it was therefore necessary to define and outline a stakeholder analysis strategy. This ensured all relevant parties are identified, informed, and engaged for the project's duration, positively impacting SYNBEE activities, outcomes and maximizing impacts.

3. Introduction to Stakeholder Mapping

In research, stakeholders are defined as individuals, groups, organizations, and communities with an interest in the development, processes, and outcomes of a research study (Deverka et al., 2012). Engaging stakeholders in research is a continuous and evolving process, utilizing various techniques to convey research messages to stakeholders and to gather their views, experiences, and expertise in response, creating a dialogue between both parties (Boaz et al., 2018). This engagement allows researchers to build a common platform of understanding with their stakeholders and provides a communication channel for stakeholders to influence the research process (Deverka et al., 2012). Overall, stakeholder engagement is a key part of knowledge transfer and exchange, requiring regular and active dialogue between knowledge producers and potential knowledge users and beneficiaries to ensure information flows both ways (Boaz et al., 2018; Lavis et al., 2003; Payne et al., 2019). SYNBEE Consortium understands

stakeholders as relevant public and private participants of the synthetic biology ecosystem, proactively shaping it and being impacted by it.

4. DEFINING SYNBEE STAKEHOLDER GROUPS

Project stakeholders can be categorized as either internal or external. Internal stakeholders are those involved in the coordination, funding, resourcing, and implementation of the project, such as SYNBEE Consortium partners. External stakeholders, on the other hand, are individuals or groups who may benefit from or influence the project but do not have a direct organizational role in its execution.

Overall, stakeholders can be divided into four primary categories (Payne et al., 2019):

- The Research Sponsors: The individuals and/or organisations legally responsible for the initiation, management and/or financing of the project.
- Knowledge Producers: The project team. This category includes all consortium members.
- Knowledge Users: Individuals/groups/organisations who can act on the information received from the SYNBEE project. This category includes academic institutions, other research groups, policy makers, service providers, SMEs, industry, investors.
- Knowledge Beneficiaries: Individuals/groups who stand to benefit from the knowledge generated during the research project. This category may include any future consumers of the products and services, which will potentially be produced by the knowledge users. Synthetic biology is one key driver of the bioeconomy worth $4 trillion (McKinsey 2020). The estimated overall market to be affected by synthetic biology exceeds $13 trillion. Synthetic biology is a disruptive technology that enables completely new processes and products for industry, medical applications and food production.

Since synthetic biology is based on mimicking biochemical natural processes, it will make processes and products cheaper and more sustainable. All the current verticals will be concerned by progress in this field.

In the context of SYNBEE, stakeholders include academic institutions engaged in synthetic biology (such as research institutes, laboratories, and universities), Start-ups, SMEs and bigger industrial entities utilizing synthetic biology in their R&D and production (at least to some extent), EU policymakers generating relevant policy/regulatory landscape and providing critical resources for synthetic biology community to thrive, and investors interested in synthetic biology solutions for climate technology, bioremediation, health, energy, food, materials, production, etc.

It is important to note that most dissemination efforts, including identifying the target stakeholder group, are dynamic and highly specific to each project (Brownson et al., 2013). Building this understanding of the target audience involves thorough stakeholder mapping to create a comprehensive list of potential producers, users, and beneficiaries.

5. STAKEHOLDER MAPPING

Stakeholder mapping involves the active processes of identifying, categorizing, and prioritizing potential stakeholders to support decision-making (Reed et al., 2009; Shirey, 2012). Beyond creating a list of potential project stakeholders, mapping ensures that crucial factors in their engagement are considered, such as stakeholders' interest levels, their potential for active participation, and the influence they may wield within the project. This approach allows for effective planning and maximizing stakeholder engagement throughout the project's duration (Bernstein et al., 2020; Walker et al., 2008).

Stakeholder mapping employs various techniques to identify, analyze, prioritize, and engage stakeholders. The process helps determine each stakeholder's goals and interests, the methods by which they can influence others, and develop an effective communication strategy. Overall, this mapping process enables researchers to compile potential stakeholders' names, analyze their roles in dissemination and practice for SYNBEE, and make informed decisions about which core stakeholders to engage with throughout the project's lifespan (Häberlein et al., 2021).

The following section outlines the specific methods we have employed to conduct stakeholder mapping for SYNBEE.

6. METHODOLOGY

The stakeholder mapping process started at the project launch (February 2023) and will continue throughout the project's lifespan. A full map of stakeholders will be disseminated online on the EUSynBioS website. Overall, the mapping process was organised in five phases:

- Stakeholders' identification and mapping, data collection
- Stakeholders' analysis and prioritization
- Stakeholders' engagement
- Publication of the map
- Continuous monitoring
- Community building

In collaboration with members of the SYNBEE consortium, our aim is to isolate specific stakeholder suggestions of public and private that are likely to have a high level of interest and desire for involvement in SYNBEE (such as investor groups and industry to provide

resources to the community, as well as start-ups and research laboratories – potential sources of innovative projects, able to boost the whole synthetic biology market in Europe).

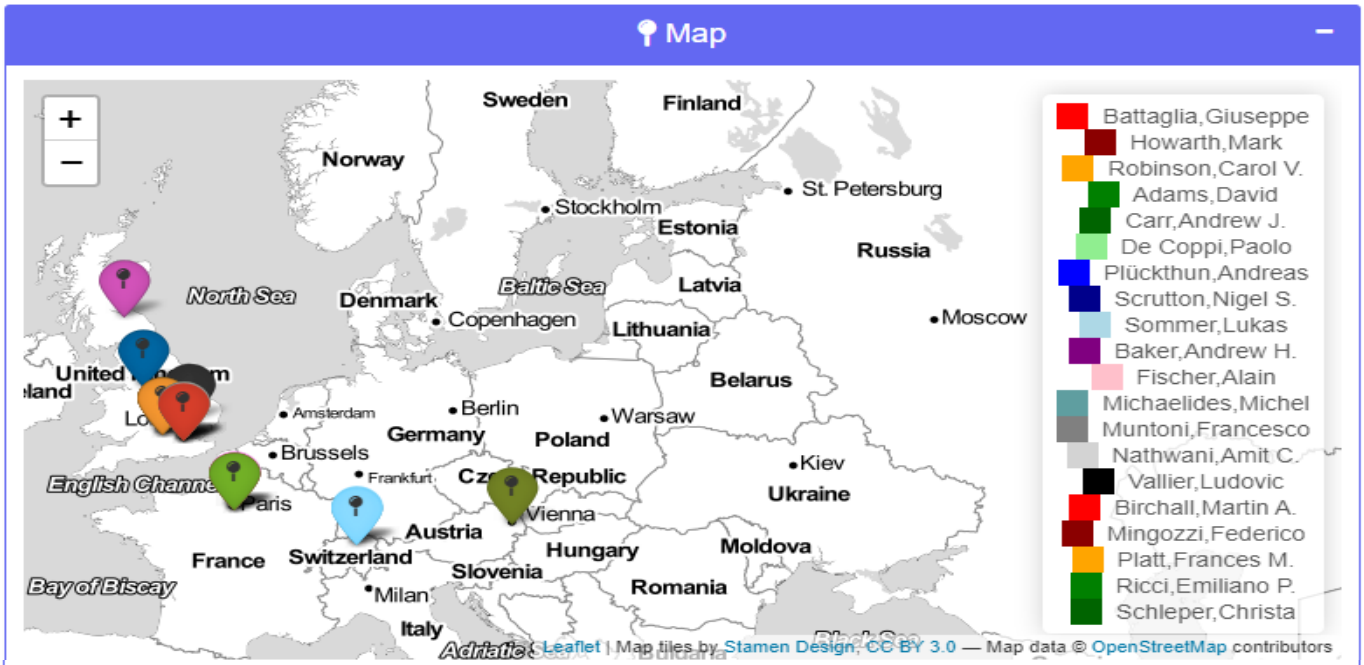
The geographical scope is within Europe, however, we anticipate later it will be important have a global picture too. This will allow to use this map not only for cooperation purposes, but also as an industry watch unit, to timely identify and anticipate upcoming trends. We would like to put on our map players from synthetic biology field in a wide sense, covering any synthetic biology technologies for diverse applications, including healthcare, agriculture, environmental applications, energy, consumer goods, materials, enabling technologies, etc.

7. PROCEDURE

Phase 1: Stakeholder identification, data collection

The aim of this phase was to identify external stakeholders that will grant SYNBEE greater visibility in target communities and categories (e.g research, academia, industry, industry associations/clusters, technology transfer offices, incubators, accelerators, associations of students and scientists) and increase the consortium's ability to disseminate the outcomes of SYNBEE. The goal was to identify potential stakeholders for each European country in collaboration with all SYNBEE partners and to create an overall list of potential organisations across Europe. The following steps have been taken during this phase:

1) Initial mapping of public and private research took place prior to the project start. This initial map mainly used scientific publications and conference to identify the key players/laboratories in synthetic biology space (Figure 1). This academic map, while helping to oversee scientific excellence of the EU research in synthetic biology, was not enough to understand the whole European synthetic biology community. We have thus decided in the frame of SYNBEE project to complete this map with private players (industry, SMEs, investors), missing on the initial map.



Fischer,Alain	1.02	2.03	+	6.49	6.88	2.48
Michaelides,Michel	1.02	5.22	0	3.72	7.2	1.53
Muntoni,Francesco	1.02	4.54	0	3.72	1.39	8.53
Nathwani,Amit C.	1.02	2.89	0	3.72	8.19	1.7
Vallier,Ludovic	1.02	2.34	0	9.57	2.3	2.83
Birchall,Martin A.	1.03	5.46	0	3.72	7.2	2.6

Figure 1. Preliminary SYNBEE stakeholder map: back-office.

2) Literature Review: We have analyzed academic publications, policy papers, and industry reports. We have used databases (NCBI MeSH, HAL, NCBI Pubmed, SEED 2021

conference (posters), Global Research Identifier Database, Twitter, ClinicalTrials.gov, PatentsView, Europe PMC, Biotech finance newsletter) for research articles. We have reviewed reports from consulting firms McKinsey, BCG, and industry insights.

3) Surveys and Questionnaires: During the SWOT analysis (WP1), the SYNBEE Consortium has designed and distributed surveys to identified stakeholders to gather their perspectives and roles. Online tool (QualtricsXM platform, TU Delft) has been used. Over 80 stakeholders have directly participated.
4) Interviews: semi-structured interviews have been conducted with key stakeholders.
5) In the frame of its activities SYNBEE Consortium has identified broad network of SMEs, start-ups, industry players and investors, working in the space, and generated a database. This excel database has been shared with the consortium via the project SharePoint. All the SYNBEE partners have been invited to contribute by identifying any missing SynBio market players, completing the database.
6) Public and Proprietary Databases: CORDIS database has been used to identify the relevant EU-funded projects, and Crunchbase database has been used to identify private stakeholders.
7) Additional stakeholders have been searched for across other collaborative networks through targeted internet searches and engagement with external experts in relevant fields (EuropaBio, EUSynBioS, IBISBA).
8) The database is permanently available for all the partners for review and updates on rolling basis.

Phase 2: Stakeholder engagement

The purpose of this phase is to formulate a comprehensive stakeholder communication and dissemination plan, which involves assigning specific engagement strategies, messages, and channels to different stakeholders. This phase involved identifying the individuals who

engaged with key stakeholders, determining the timing and manner of these interactions, and designating the responsible personnel. To effectively align stakeholders with appropriate engagement strategies, it is imperative to comprehend their needs and how SYNBEE can address them. Prior to scheduling meetings to present SYNBEE to potential stakeholders, each stakeholder was scrutinized based on the following inquiries:

- What motivates the stakeholder (Fundraising, scouting for projects, etc.)?
- What information and/or mission statement does the stakeholder communicate to society?
- What unique value does SYNBEE provide that will incentivize stakeholders to support the project?
- How might the stakeholder prefer to receive information from SYNBEE?
- What types of activities or collaborations can the stakeholder anticipate from SYNBEE, and vice versa (Engaging in pitch competitions, hackathons, visibility via website and social media, participation to events and studies, matchmaking, mentoring, sponsoring, sharing expertise, etc.)?

Engaging directly with stakeholders is an effective method to address these questions and cultivate successful relationships throughout the project's duration.

Phase 3: Publication of the map

The SYNBEE Consortium has identified other institutions and European projects working on complementary maps, such as academic SynBioMap produced by EUSynBioS Association, or Bioproduction stakeholders' map, consolidated by Genopôle. We have discussed with diverse market players, and it has been decided that the most efficient action for community would be to have one consolidated map, rather than subparts of diverse maps on different websites. We have therefore successfully negotiated with EUSynBioS to complement their existing map with the data collected by the SYNBEE Consortium. This will not only allow to have all the

relevant stakeholders in one place, but also to sustain the tool beyond the SYNBEE project duration.

Phase 4: Continuous monitoring

The SYNBEE Consortium partners will regularly update the stakeholder map to reflect changes in the landscape, monitor emerging trends and new stakeholders.

Phase 5: Community building

SYNBEE Consortium considers that a stakeholders' map as a tool is already very useful for the community, but it might be static, and needs proactive engaging by all the interested stakeholders, to actually generate positive impact for them. Meanwhile a new company, Jogl, puts in place efforts to enhance the collaboration efficiency of deeptech ecosystems. Structured per industrial verticals, it has sub-groups related to specific narrower topics. We currently discuss with Jogl a possibility of creating a SYNBEE community on Jogl platform, involving all the European synthetic biology stakeholders, willing to cooperate, interact, exchange, collaborate. Such a community, once generated, would function as a social network or market place, easily and quickly matching relevant participants.

8. Data Protection

Any data collected from stakeholders adheres to the data management principles and regulations outlined in the Data Management Plan for SYNBEE. The following considerations must be observed:

- When transferring personal data across organizations or countries involved in SYNBEE, all partners must ensure the requisite level of privacy protection in accordance with the European General Data Protection Regulation (Regulation (EU) 2016/679).

- The storage, collection, and protection of data by partners are guided by their individual contexts, though always in compliance with GDPR. Each partner's Privacy Policy should be accessible on their respective websites.
- All stakeholders from whom data is being collected are progressively informed, either orally or in writing, about the project and its objectives. They will also have the right to request removal from any contact lists at any time.

All the data planned to be published on the stakeholders' map is publicly available. According to a specialized lawyer, if we intend to share the pseudonymized data or some trends, there's no any specific action to implement. If we need to share any non-anonymized personal information, we will inform the concerned people, that we have identified them and would like to introduce to some potential partners, and/or to mention them as experts in a specific field (to be compliant with the GDPR).

9. Outcomes and Expectations: SYNBEE Stakeholders

The mapping exercise has allowed us to identify over 500 relevant stakeholders, which can be classified into the following categories:

1. Regulatory bodies and policymakers:
   - European Commission (EC)
   - European Medicines Agency (EMA)
   - National regulatory agencies (e.g., ANSM in France, BfArM in Germany)
2. Research and academic institutions:
   - Universities with strong synthetic biology programs (e.g., ETH Zurich, Imperial College London, TU Delft, Max Planck Institute, INRAE, CNRS)
   - Research consortia and networks (e.g., EUSynBioS, SynCellEU, ERASynBio)
3. Industry, SMEs, Start-ups:

- Biotechnology companies (e.g., Novozymes, Solmeya, etc.)
- Start-ups (Laastix, NoPest, Asteasier, InLux Biotech, GreenLeaf, KOA Biotech)
- Industry (L'Oréal, Shell, Bayer, BASF)
- Industry associations (e.g., EuropaBio)

4. Non-Governmental Organizations (NGOs) and Civil Society:
   - Environmental and ethical groups
   - Patient advocacy groups
5. Funding Bodies and Investors:
   - European Investment Bank (EIB)
   - Horizon Europe, European Innovation Council (EIC)
   - National funding agencies (Bpifrance, ANR, Innosuisse, Innovate UK, Innoviris, UKRI)
   - Venture capital firms and business angels focusing on biotech, climate tech, synthetic biology, impact investment (SynBioVen, SPRIN-D, Capital13, Sofinnova, Elaia, Planet A, Shift Invest, Omnes Capital, Syensqo)

The Stakeholders' map will be included into the EUSynBioS existing SynBioMap and will be published here: https://www.eusynbios.org/synbiomap. It uses AirTable tool to conveniently screen through the community, filter per geography, type of stakeholder, key technology, primary field of application (Figure 2 below).

Following the completion of stakeholders' mapping, the subsequent step involves engaging key stakeholders in SYNBEE activities (pitch competitions, training, and hackathons) and events, such as organizing discussion sessions between researchers, industry, Start-ups and policy makers, and soliciting input from specific stakeholder groups. Stakeholder engagement is an active process, necessitating participants to consistently seek the participation of identified stakeholders of interest, while remaining considerate of their goals and time constraints. The effective transfer of knowledge and information from SYNBEE requires an

active engagement approach, ensuring that key stakeholders are regularly updated on SYNBEE's progress and that their interest in the project's success is sustained.

One example of event, where stakeholders' map has been used, was the EIC x SYNBEE Day, organized in Brussels on April 9, 2024. The map has helped the SYNBEE consortium to identify and contact in the most efficient way the relevant stakeholders from academia, industry, policy making and investment communities, and engage them in a meaningful dialogue.

It has also helped us to communicate the information about the SYNBEE Pitch Competition across public and private SynBio community to maximize participation and quality of the selected projects.

Date of creation	Institution name	Institution type (University, research institute, industry, SM startup, policy maker, association)	Location	Description	Main topic (energy / cosmetics / consumable products / environment / generalist)	SynBio examples	Contact information (email/phone)	Website
1945	3i Group	Investor	UK	3i is an international investment manager focused on mid-market Private Equity, Inf	Impact investment	synbio amor	irteam@3i.com	www.3i.com
2000	AGORANOV	Incubator	France	Agoranov is a public Science & Tech incubator based in Paris.		synbio amor	courrier@agoran	www.agoranov.com/
2009	Almi Invest	Investor	Sweden	Almi Invest is a venture capital company that invests in Swedish companies with sca	Impact investment	synbio amor	maria.kessling@a	www.almi.se/Almi-Invest
	Alter Equity	Investor	France		Impact investment		victoire.chariet@	https://www.alter-equity
2010	Anthemis	Investor	UK	Anthemis Group is a global platform that cultiva	Impact investment			www.anthemis.com
	Aperam Ventures	Investor	Luxembourg	Aperam Ventures is a strategic investor who inv	Impact investment		christophe.pomp	http://www.aperam.com
2013	Aqua-Spark	Investor	Netherlands	Aqua-Spark is an investment fund with a focus c	Impact investment		info@aqua-spark.	www.aqua-spark.nl
2022	Arctic Investment Group AS	Investor	Norway	Arctic Investment Group is a northern Norwegian investment company			eskild@ai-group.r	www.ai-group.no
1-Sep-12	Ascension	Investor	UK	Ascension is an early-stage VC built by exited entrepreneurs to back the next genera		synbio amor	info@ascension.v	www.ascension.vc
	Astanor Ventures	Investor	Belgium	Food and Agritech Venture Capital investing in i	Impact investment		kanira@astanor.c	http://astanor.com
	Astarte Capital Partners	Investor	UK	Astarte is an asset management firm investing c	Impact investment		george.zamparas	http://www.astartecp.co
	Audacia	Investor	France	Blue biotechnology, renewable energy, ocean p	Impact investment		quentin.robert@	https://www.audacia.fr/
2018	A-Ventures	Investor	South Korea	A Ventures is a venture capital investment firm.			stephane@a-vent	aven.vc
	b.value AG	Investor	Germany	As an early-stage deep tech investor, we promo	Impact investment		Marie.Kappen@b	http://www.bvalue.de
2000	Balderton Capital	Investor	UK	Balderton Capital is a venture capital investor that supports technology businesses.		synbio amor	inbound@baldert	www.balderton.com
2018	Bioinnovation Institute	Investor	Denmark	BioInnovation Institute is a biotechnology startup that offers entrepreneurs and researchers in lif			cbt@bii.dk	
2021	Blue Pelican Capital	Investor	France	Blue Pelican Capital is supporting climate innov	Impact investment			bluepelicancapital.com
2016	Blue Yard Capital	Investor	Germany	BlueYard invests in founders with transforming ideas that decentralize markets and empower humanity. Typically $1-3m as an initial investm				
	BlueCrow Capital	Investor	Portugal	structuring and setting up investment and dives	Impact investment		[redacted]	https://www.bluecrowca
	BNP Paribas SA	Investor	France	Blue biotechnology, ocean pollution	Impact investment		Sylvain.taboni@b	http://Www.group.bnpp
	BOLD (L'Oréal)	Investor	France		Cosmetics, cosmeceuticals			https://www.lorealboldve
	Bonafide Wealth Management AG	Investor	Liechtenstein	We are one of the leading global asset manager	Impact investment		mb@bonafide-ltd	https://www.bonafide-ltd
31-Dec-12	Bpifrance	Investor	France	Bpifrance provides financial solutions for companies that are booting up the listing		synbio amor	F3A@bpifrance.fr	bpifrance.fr
2-Feb-11	Business Growth Fund	Investor	UK	Business Growth Fund is an influential investor in small and mid-sized businesses.		synbio amor	enquiries@busine	www.bgf.co.uk
1-Aug-10	Crowdcube	Financial services	UK	Crowdcube enables individuals to invest in small companies in return for equity or a		synbio amor	info@crowdcube.	www.crowdcube.com/
1956	DWS Investment GmbH	Investor	Germany	DWS Investments is an asset management com	Impact investment		info@dws.com	www.dws.de
1-Jul-97	Earlybird Venture Capital	Investor	Germany	Earlybird is a venture capital investor focused on European technology innovators.		synbio amor	—	earlybird.com/
2004	EASME - EU Executive Agency for S	Gouv agency	Belgium	EASME is the European Union executive agency for SMEs in charge of Enterprise Eu		synbio amor	EASME-SME-HELF	ec.europa.eu/easme/en
1969	Eight Roads Ventures	Investor	UK	Eight Roads Ventures is a global venture capital firm managing $11bn of assets acro		synbio amor	—	eightroads.com/en/
	Elaia	Investor	France	We are a vc fund investing in B2B tech europea	Impact investment		ramarouche@ela	https://www.elaia.com
4-Apr-13	Eleven Ventures	Investor	Bulgaria	Eleven supports early-stage tech companies from Southeast Europe in Fintech, Heal		synbio amor	eleven@11.me	11.vc
1998	Enterprise Ireland	Gouv agency	Ireland	Enterprise Ireland is the government agency responsible for the development and p		synbio amor	equitydept@ente	enterprise-ireland.com
1-Sep-11	Entrepreneur First	Investor	UK	Entrepreneur First brings ambitious founders together to build globally important te		synbio amor	info@joinef.com	www.joinef.com

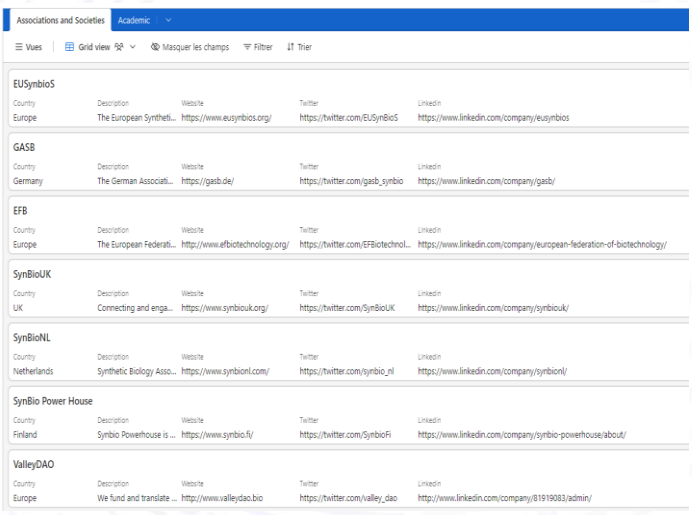


Figure 2. SYNBEE Stakeholder's Map. Fig.2a on the top: Map Excel back-office. Fig.2b: bottom on the left: Map visualization on EUSynBioS website. Fig.2c: bottom right: AirTable view to filter and detail.

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