



# mobilise europe!

A practical pocket guide for those who want to create  
their own regional policies within mobile



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[www.mobilise-europe.mobi](http://www.mobilise-europe.mobi)

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***“You can’t connect the dots looking forward. You can only connect them looking backwards. So you have to trust that the dots somehow connect in your future. You have to trust in something – your gut, destiny, karma, whatever. Because believing that the dots will connect down the road will give you the confidence to follow your heart even when it leads you off the well-worn path; and that will make the difference.”***

**Steve Jobs**

This pocket guide is about connecting dots for the mobile services industry within Europe. We identify the dots that demonstrate knowledge about success factors and search for new, as yet unknown dots. We look at the dots that highlight excellence and link them with the dots that are striving

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to achieve excellence in the belief that it is only when people, regions and nations connect and communicate with each other, that we can meet the challenges that lie ahead of us.

This guide is designed as a way to understand the drivers behind excellence within the field of mobile and mobile services in Europe. It can be used as a practical handbook to put general recommendations into a context and make them specific. It can also be used as a way to start connecting your dots with all the other dots in Europe.

It is about the experiences from, and work of, the EMMIA Policy Learning Platform and what we can learn from those regions in Europe which have already achieved excellence within the mobile industry and with new mobile services. It has been written for those of you who have the ambition to take your regions towards excellence with the help of mobile technology. This guide is filled with insights, experiences, suggestions and recommendations. It also provides practical advice for those who want to start contextualising general recommendations in order to make them more specific to a certain region.

This pocket guide summarises, in an easy and digestible format, the key conclusions of the much more detailed “mobilise europe report” which is available at [www.mobilise-europe.mobi](http://www.mobilise-europe.mobi).

## Background – what is mobile

Trends come and go; but we already know that the influence from mobile services on other industry sectors will increase during the immediate future. Some general technology trends that will definitely affect us, are:

### **Into the Cloud**

Even if we think that cloud services are something natural today, only about 5 percent of business applications are run from the cloud. For SMEs the step into the cloud will not only mean new business opportunities, but also new challenges.

### **Big Data**

Using Open Data as a source combined with huge amounts of other information will give us totally new ways of identifying customers and their needs; following their behaviour and making decisions. Mobile solutions that use Big Data will affect our daily life even more and create new business opportunities. In particular, the COPERNICUS/GMES program of the EU will add to Big Data when achieving a freely accessible, autonomous, multi-level operational Earth Observation capacity.



### Internet of Things

We have heard researchers talk about the Internet of Things for many years, but now it is becoming a reality. Cisco talks about there being 50 billion connected devices by 2020 this development will introduce a number of challenges such as: security and integrity issues, standards, environmental aspects, etc. The opportunities for SMEs are obvious – the market, is estimated to be worth over 15 trillion Euros.

### Localization

New localization technologies (for instance provided by the GALILEO system) are providing much better accuracy. Also indoor positioning is opening up new possibilities for location-based services. Positioning will therefore become something that is completely ubiquitous and used in all types of items. In the short term, wearables and public objects will create new innovative business opportunities.



## About EMMIA @ EMMIA PLP

The European Mobile & Mobility Industries Alliance (EMMIA) is a successful attempt by the European Commission to shape a community of regions across Europe that actively learn how to support mobile and mobility industries as a driver for competitiveness, job creation and structural change. We are doing this by developing and testing tomorrow's policies and tools for mobile and mobility industries and sharing this knowledge with other interested partners. The objective of the Alliance is to raise additional public and private funding in support of mobile and mobility industries, e.g. by better use of Structural Funds and by co-ordinating current and planned initiatives. Within the actions, large-scale demonstrator projects give the regions the possibility for developing practical knowledge through the implementation of mobile services in tourism, agriculture and smart cities. EMMIA has promoted more effective use of mobile technologies, applications, and services throughout the economy; as well as promoting the emergence of new industries that combine modern technologies, including those based on the European Global Navigation Satellite Systems, GALILEO and EGNOS and COPERNICUS (GMES) with innovative services.

In close cooperation and interaction with partner regions, the EMMIA Policy Learning Platform core team has developed the processes and techniques presented in this guide book. They are an open invitation to all interested representatives and stakeholders in EU regions, who wish to use the mobile service industry as a key driver of economic and societal change in their regions.

The EMMIA Policy Learning Platform is chaired by Karin Drda-Kühn, Managing Director at media k GmbH. The core team consists of the following partners:

### **bavAIRia e.V., Munich, Germany**

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In addition to the core members the EMMIA PLP has more than 20 regional as well as institutional members from EMMIA partner initiatives as well as from European institutions and agencies having teamed up with us.

Please find a list of the EMMIA PLP member regions and institutions on the next page.

To find out more about the European Mobile & Mobility Industries Alliance, please visit [www.mobilise-europe.mobi](http://www.mobilise-europe.mobi). The full version of EMMIA Book is also available there.



## EMMIA PLP members institutions / regions and initiatives

**Member regions:** Baden-Württemberg, DE; Catalonia, ES; Luxembourg, LU; Czech Republic, CZ; Tartu Region, EE; Trollhättan City, SE; Wallonia, BE; Dortmund, DE; Aosta, IT; Styria, AT; Rheinland-Pfalz, DE; Vidin, BG; Bavaria, DE; Alpes-Maritimes, FR; East-Midlands, UK; Oresund, SE; Province of Rome, IT

**External members:** Stockholm, SE - Place Invest AB; Brussels, BE – EBN.

**EC and agencies:** European GNSS Agency/Marketing, European Space Agency, Technology Transfer Programme Office, European Telecommunications Standards Institute (ETSI), DG Enterprise Copernicus Services, DG Enterprise Galileo, DG Enterprise SMEs: Clusters & Emerging Industries

**Innovation Partnership:** Region of Kyustendil, BG; LUXINNOVATION GIE, LU; Dublin / Cork, IE

**Other EMMIA initiatives I:** LIMES, MOBICAP, CULTWAYS, EMMINVEST, Grow Mobile

**Other EMMIA initiatives II:** S2G2M2, myEOrganics, SeamlessCities, CITI-SENSE-MOB, Traffic Shaper, Galil-EU, LDA

**Other EMMIA initiatives III:** obsAIRveYourBusiness, SATURN

Further details can be found on the initiative's website.

## Finding the hotspots of Europe

The first tool used to find excellence within the field of mobile services in Europe was to analyse quantitative data from several studies made on emerging industries, and combine it with knowledge about the mobile sector. From this analysis, ten different indicators were identified:

# Paris

## Access to knowledge and talent

Are there universities in the region with a reputation for delivering relevant courses and supporting quality research, and does the region have the right “profile” to attract talent from other parts of the world?

## Market

What is the strength and depth of the market? Is it quick to adopt new technologies?

## Financial tools

Are there SME instruments and financial support (both public and private) available?

## Industrial history

Does the region have a history in the mobile industry with presence of well-known brands?

## General Impression

What is the first impression of the region and what is it known for?

## Growth of startups

How many new companies within the field of mobile started during 2012, and how is the start-up scene emerging?

## Cluster strength

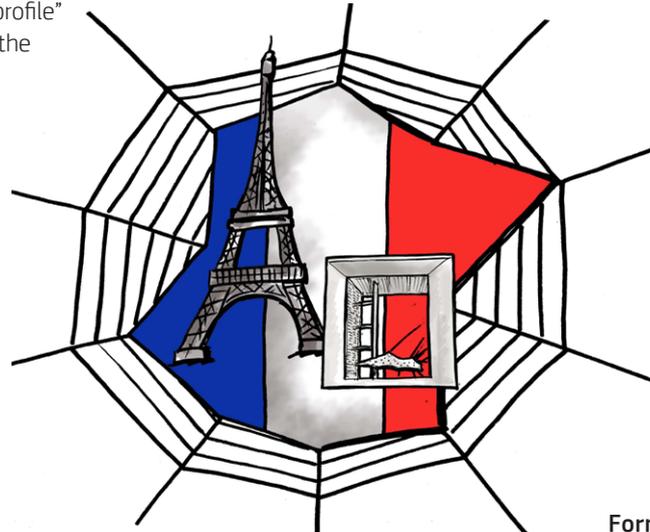
Is the cluster strong and what supporting structures are in place?

## Informal structures

In what ways is the cluster ethos and influence communicated around the region?

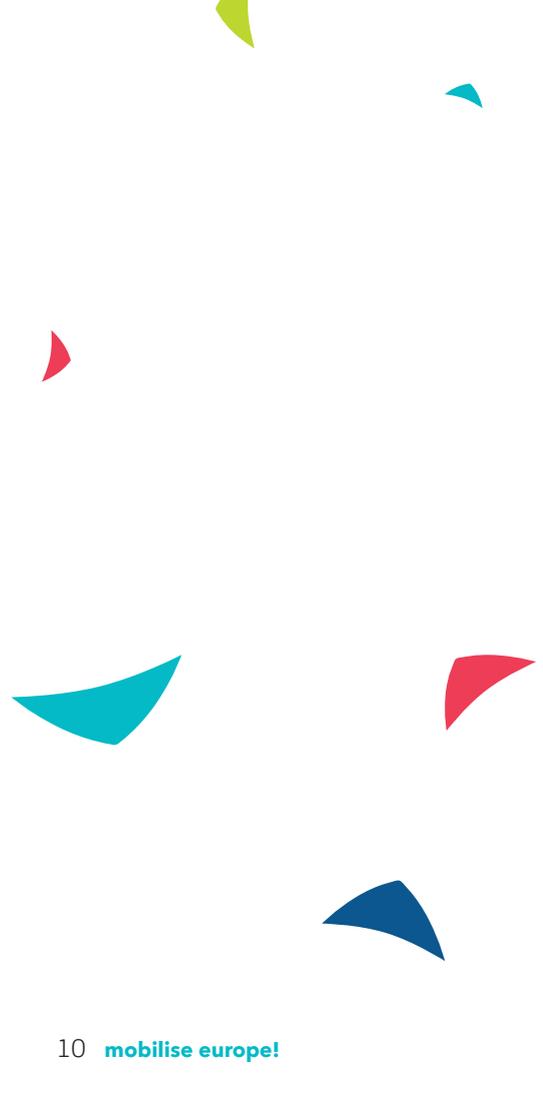
## Formal support

What is the size and nature of publicly funded support such as incubators, development centres etc.?



## Important events

Does the region attract important events for the industry such as the Mobile World Congress, or Web Summit?



## The 20 hotspots

The indicators gave us knowledge about how to compare regions with each other. As a result, we were able to select twenty examples of European hotspots that provided an excellent environment in one or more of the indicators for start-ups in the field of mobile technology and services.

The list is not ranked, and the selection of twenty hotspots was made to show diversity and to gather knowledge about the drivers behind regional growth in an emerging industry. It was felt that twenty regions would provide a wide enough knowledge base, and still be manageable. Therefore, it is important to stress that the description of “excellent” could be applied to other regions not appearing on the list, and the inclusion of a region is not necessarily an indication that it is the best place for any individual to start a mobile company.





## Digging deeper

In order to find out more about the drivers behind excellence, and go beyond pure data analysis, five regions were chosen for a more in-depth study of their regional innovation systems. To give the broadest possible view, they were chosen to ensure a diversity of size, level of public policies, historical background and geographical location.

The methodology used for this study was to carry out in-depth interviews with relevant people across the region. In total 106 interviews were conducted across the five regions. The interviewees included people from the public sector, venture capital companies, start-ups, multinationals, incubators and universities. The interviews gave an insight into how the start-up scene is evolving, and what critical factors are involved in creating growth in the mobile sector.

## Berlin: a bottom-up driven start-up community

The start-up community within the mobile sector has been growing rapidly over the past few years. It is now regarded as one of the most interesting start-up communities in Europe. Even though there are some great challenges for the city, Berlin is seen as a strong brand; therefore it is able to attract entrepreneurs and competences from all over the world. Salaries are low, which benefits companies, and the cost of living is low, which benefits workers. This is facilitated by having some of the most open immigration policies in Europe. Berlin possesses a young and creative population, with a “can do” attitude providing an inspirational and creative touch in the city. The international scene in Berlin means that the spoken language is invariably English, even though the official language is German. A major difficulty for the region is that the local home market is too weak to sustain the growth of the industry. This weakens the ability of companies to carry out R&D, leading to a limit on long-term growth of both the companies themselves, and the region in general. Therefore, even though the city is “cool” and has a large number of start-ups, not many companies have succeeded in the long term. Most companies start up and then either move on or die out. So, despite the ease with which companies can start-up in Berlin, keeping them alive and growing could become a problem.





## Barcelona: mobile world capital?!

The city of Barcelona and region of Catalonia, have arguably the most well-defined public policies in Europe when it comes to mobile services. This has paid off by producing a vibrant community of start-ups. Many of these were drawn to the city because it is the host of the annual Mobile World Congress. Clear strengths are that it is easy to start a company, talent is cheap, there are top universities to collaborate with and there is a strong commitment from those who have already succeeded to help others. The favourable climate and the city itself are also attractions. On the weak side, we see a language barrier to international communication, the policies are directed more towards local companies, and most of the companies that have developed tend to be family owned and they lack ambition to become international. In that sense the public policies and incentives have failed.



## Estonia: European Mobile Industry start-up tiger

Estonia has a clear national agenda when it comes to the development of the mobile sector. It was one of the first countries to introduce a host of public mobile services that range from parking to voting. Strengths are: the high level of adoption of ICT within the public sector, a very good reputation, and that it is a small country which enables easier implementation of national policies, driving good integration of local businesses into global innovation networks. On the weak side, we see that the early growth is not sustainable as the industry in Estonia has failed to reach critical mass. There is a decreasing population through migration, especially of graduates, exacerbating the shortage of qualified ICT professionals. In addition, there is a low level of R&D nationally as a result of the small number of universities that are able to support research in the area.

## London: innovation growth in a roundabout way

The rapid growth of London's mobile services start-up community (the fastest growth in Europe) has led to the epicentre of the cluster in Shoreditch being dubbed "Silicon Roundabout". Growth has been assisted by the clear business focus of the city. The city's clear strengths are the innovation climate, the multi-cultural environment, excellent access to capital, a critical mass in start-ups and very good infrastructure. On the other hand, it is held back by the lack of collaboration with traditional R&D, the lack of large multinational companies within the mobile sector based in the city and the economic isolation of London from the rest of the UK.



## Malmö/Lund: one region, two worlds

The story behind the Malmö/Lund area starts with two things: the invention of Bluetooth Technology in Lund and the change from a traditional heavy industry city to a knowledge industry city in Malmö. Even though the area only consists of about 400,000 inhabitants, it hosts multinational companies like Sony, Microsoft, Ericsson, Huawei, Samsung and Intel. The long history within mobile is one of the region's strengths, together with more recent success stories, excellent infrastructure, leading universities, multinational companies and strong collaboration within the region. Conversely, the region suffers from a lack of capital, a weaker international reputation, not enough commercial thinking, a small home market (which also can be an advantage in some cases) and a low acceptance of failure.



## The emerging hotspot backbone

*"In all those places where we see a growing number of start-ups within the field of mobile services, we also see a large presence of what we call 'the creative class'." Richard Florida.*

In each of the twenty areas selected there is a large creative class community. In the five cases that we have studied more deeply, the presence of artists, developers, media people and other knowledge workers is significant. Very good examples of this are: the Shoreditch area in London, Kreuzberg in Berlin and Möllan in Malmö; all these areas were regarded as rough neighbourhoods just five years ago, but today they are regarded as the 'hippest' places in the region. The combination of cool clubs, new restaurants and well-educated inhabitants seem to be the most important factors when we look at the start-up scene in Europe.

The ability to attract the right foreign talent into a region should not be underestimated. But, from inspection of policy documents from most regions in Europe, this is still an area where more work needs to be done. Of course everybody realises that talent is important; but few regions have a clear strategy on how to attract talent – a failing that is not limited to Europe.

## Learning from the case studies

### **Industry presence and access to capital beat policies**

A well-defined regional policy, preferably as a part of a smart specialisation strategy is useful. But, regions like Berlin that do not have such a policy, or London with very general policies, have overcome this and have a high success rate because they have huge industry presence or excellent access to capital.

### **Industrial history is more important than many of us believe**

If a region has a history in the mobile industry or has industries related to mobile services it will create a mind-set within those start-up companies to use the technology.

### **Incentives have low impact**

Incentives such as: tax deductions, cheap offices and business development schemes for start-ups are seen as short-sighted and do not encourage medium to long-term growth. Access to talent and money is much more important together with the 'vibe' of the region, and its entrepreneurial culture.

### **A small home market is often an advantage**

A small home market should force companies to think of internationalisation from day one; and in so doing the companies will be more competitive.

### **Infrastructure, infrastructure, infrastructure**

According to those interviewed, the most important factors for new companies when deciding where to locate, are: public transport, 4G, Wi-Fi in cafés, labs, meeting places, etc.

### **Public sector can play a role as a buyer**

Estonia is the best example of how the public sector can create a whole industry. Policies forcing integration of mobile services into government services for voting, tax declarations and other public activities were introduced as far back as the 90's.

### **Compensating for a lack of capital**

Even if a region does not have access to large amounts of risk capital, this can be compensated by the presence of industry, the public sector acting as a buyer of innovations, and international collaboration with actors on the financial market.

## General recommendations – illustration

Policy recommendations are hard to develop. They can be too generic – so they don't appeal to the people who are supposed to implement them; or they are too specific – and will only work in one type of environment. That is why this guide has three levels of general recommendations that can be applied to regions with different levels of experience.

**The excellence level** is demonstrated by the original twenty regions, studied and shared by regions with similar profiles.

### **Recommendations for these regions are:**

- Secure access to capital, especially for small regions
- Attract big brands
- Recognise the importance of indirect factors
- Don't interfere with the market

**Climbing level** is typified by regions that have some of the things that are needed to create excellence, but still need to build critical mass or infrastructure in order to move further up the value chain.



**Recommendations for climbing regions are:**

- Develop connections with providers of capital
- Focus on strengths
- Build up knowledge and access to knowledge
- Invest in infrastructure
- Create policies promoting the public sector as a buyer

**Challenger level** is applied to regions that don't have an existing mobile or mobile service industry, and where other sectors are stronger. These regions may have a strong cluster within tourism or agriculture for instance. Therefore, mobile services will become a part of the core offers from these sectors but not an industry in itself.

**Recommendations for challenger regions:**

- Focus on regional strengths
- Build infrastructure
- Mobile services based on existing strengths are more likely to succeed
- Build trust
- Build support systems like cluster organisations



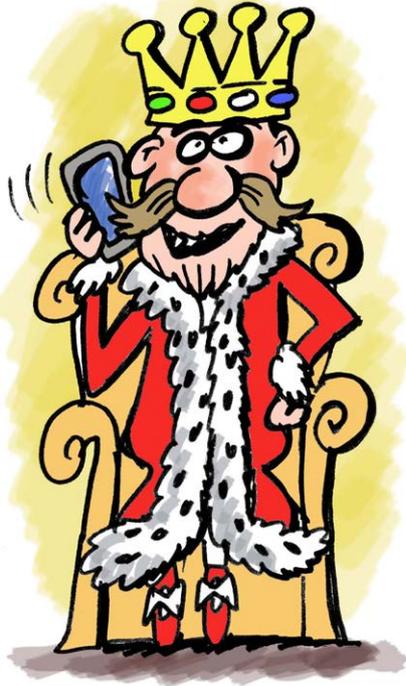
**Focus on your strengths**

## Networking



## Contextualising the recommendations

In order to find out how the recommendations work in real life, three innovation partnerships were created to allow them to be tested in regional innovation communities. The results have been reviewed and presented as contextualised specific recommendations that could be implemented on a regional level.



## Luxembourg: climbing towards excellence

Through workshops the general findings and recommendations were put into a regional context and the following specific recommendations were outlined:

- Combine mobile technology with existing industries, for instance the financial sector
- Increase activities that attract talent
- Make it easier to start up a new company
- Create test beds and large-scale demonstrators
- Create an open data portal in order to boost new business opportunities
- Build capacity through new digital methods for sharing knowledge
- Introduce free Wi-Fi in Luxembourg
- Increase collaboration between industry and the university

The work has resulted in a policy brief containing concrete actions for the public sector, and a public presentation with feedback from the innovation community.

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## Kyustendil: challenging old mind-sets and habits

The region of Kyustendil in Bulgaria has a huge desire to develop new jobs and attract businesses to the region. However, it faces many challenges: it has an ageing infrastructure, a lack of relevant talent, a very bureaucratic administration for SMEs, low self-confidence and a lack of financial resources.



The involvement of key people within the regional public structure, combined with experience from EU – funded structural programmes has made it possible to contextualize the general recommendations and make them more specific to the region:

- Focus on existing industries within the region – agriculture and tourism, and use them as the focus of a smart specialisation strategy. The strategy should drive the implementation of mobile services that create and connect smart agriculture, a functional food industry and experience-based tourism.
- Invest in infrastructure that makes it possible to be better connected. The region needs fibre-optic connections, upgraded 3G and 4G networks and access to public Wi-Fi. There is also a need for more meeting places, preferably connected to existing industry structures, for instance, tourist attractions.
- Increase the level of education by developing higher education courses in agriculture, functional food and tourism. This could be done in collaboration with either the University of Sofia or other international universities.
- Work to build trust by creating for instance, a cluster organisation using the existing models in Europe. Activities should concentrate on networking and building trust.

## Dublin: taking excellence one step further

The city of Dublin (extending to the cities of Cork and Waterford) is one of those spots in Europe that has already achieved excellence in the field of mobile development. Stakeholders drawn from the public sector, universities and industry created a set of recommendations that concentrated on finance and market access:

- Create better connections between public funding and private venture capital. This includes encouraging development accelerators such as Wayra.
- Develop long-term relationships with large brands in order to minimize risk when multinationals leave.
- Connect public policies for culture with enterprise policies. It is important that talent is recruited and retained in the region, culture plays an important role in this.
- Improve existing policies with the aim of reducing governmental intervention where it is not necessary.
- Create a roadmap of what funding is needed, where and when, and use the roadmap to assist the development of public policy.



## Some lessons learned

Putting general and often generic policy advice into a real context emphasises how hard it is to develop policies that work. During the 'reality check' of the innovation partnerships we learned that the reality is always more complex than first imagined and that some things just take a long time to change. But, we also learned that Europe is filled with enthusiastic, highly engaged, passionate and skilled people who want to create change in order to improve conditions in their regions.

### Reflections:

- Words don't always mean the same thing to everyone. We need a common vocabulary in order to ensure good understanding.
- The more people you involve the better recommendations you can provide. Crowdsourcing is a good vehicle for creating policy recommendations.
- Physical presence is essential. If you want to give advice to a region, you need to go there. This advice seems obvious, but it does not always happen.
- Identifying and working with people who are passionate about change at an early stage makes the whole process much easier.

## A practical guide to contextualise policy recommendations

During the compilation of these recommendations we did some things that worked well and some things that didn't work quite so well. So, on the following pages we want to share some practical advice for anyone who wants to develop or refine regional policies for mobile services.

### Setting the scene

The essential groundwork that needs to be done before starting work includes: understanding the existing mechanisms within the innovation environment, assessing the strengths that can be built on and the weaknesses that need to be overcome. If the region does not have a SWOT analysis, it is recommended that one is carried out. It is also recommended that any earlier reports for the region are examined.

**Who to invite**

Concentrate on engaging with people that are active in building your regional strengths. The Triple Helix that connects industry (start-ups, SMEs and large companies), government (incubators, regional development offices, cluster organisations) and education (universities, vocational training, other higher education) are the ideal sources to draw from.

But do not forget other stakeholders such as users, intermediaries, NGOs and citizens.



## Arranging a workshop

From experience we know that the best way to get a good result in contextualising general recommendations is to use people's knowledge. So your workshops should be as inclusive as possible and allow everybody to be able to influence the final result.

In our experience, the tried and tested format of posing a number of questions for discussion in groups and collecting responses through post-It notes in different colours engages people and works very well.



## Getting the information right

In order not to get swamped through information overload, it is important to structure your questions carefully. By using the topics recommended for the type of region you are addressing, the questions can be tailored to ensure that the information returned is relevant and provides an easy to understand picture of the region.

### **Crowdsourcing**

Crowdsourcing was employed to get the information used to produce the contextualised recommendations for the three regions that we worked with. If further clarification is required a small panel of experts could be used to comment on the results.

### **Communication**

It is important to construct a communication plan early in the process of developing policy recommendations for a region. It should include a target group analysis (on different levels), what channels to use (including social media), when to communicate different types of information and what you want to achieve through that communication.



## Tips and Tricks

### **How to engage**

If you run a workshop you want people to be engaged. Some simple things are essential:

**Venue** – try to find a venue that will make your group feel comfortable and that gives the right “mood” for what you want to accomplish. For instance if you are talking about start-ups, find a venue in a co-working environment or in an incubator. Make your audience happy – make sure that plenty of refreshments, including coffee, biscuits and fruit are available, especially if you expect people to work in groups.

**Ensure that everybody talks** – research tells us that people who say something during the first ten minutes of a workshop will continue to contribute throughout the session. So, it is important to have a small exercise at the beginning where everybody gets the opportunity to say something.

**Communicate in writing** – even if everyone has their say, just talking will not give you the full picture. Make sure that you also have parts of your workshop where people communicate in writing, for instance using post-It notes or big sheets of paper.

**Take notes** – appoint someone to take notes so that there is a record of what was said during the workshop.

**Follow up** – make sure that everybody who attended the workshop gets the opportunity to react to your documentation. Once the first draft is complete, send it to everyone who attended or share it through a file sharing service for a couple of weeks.



## How to CREATE IMPACT

So, you have engaged people and created specific policy recommendations for your region. But, how do you convert them from just being part of a report into real actions? Implementation is the next thing to consider.

### **Make an implementation plan**

Most projects fail because there is no plan in place to take the recommendations and turn them into actions. So, plan for this from the beginning and also make sure that your plan has the support of people that can make things happen!

### **Find your ambassadors**

You can't do everything on your own. So, make sure you have support at all levels: politicians, public officials, journalists, people from universities and industry. Twenty people supporting you directly can influence a thousand – and then things start happening.



### **Go public**

Find relevant events in your region and present the recommendations there. Make a presentation that is easy to understand and access so that others can also use it. Spread your presentation amongst your ambassadors; convince them to use it when they do presentations. Creating impact is about reaching as many people as possible.

### **Go for the low hanging fruit**

Always start with something that is easy. Choose the recommendations that are the most easy to implement and take action on them. It will not only give you some confidence, but it will also convince other people that things can be done. Then, you can move on to the things that are more complex.

### **Remember – change takes time**

Have a realistic timescale. To change mind-sets and habits will take some time and there is little you can do about that.

### **Allow failure**

You will make mistakes. Realise that and try to learn something from your mistakes and move forward. It is equally important to allow others to make mistakes and to learn from their failures too.

### **Share**

When you have started the process, tell others on the EMMIA PLP website: [www.mobilise-europe.eu](http://www.mobilise-europe.eu). It's a great place to go for inspiration and to share your journey towards mobile excellence.

## Why you should read this Guide

This is a pocket guide about the experiences of the EMMIA Policy Learning Platform. It covers what we have learned from the regions across Europe who have already achieved excellence within the mobile industry and implemented new mobile services.

The full version of this pocket guide, the “mobilise europe report” is available for download on the initiative’s website at [www.mobilise-europe.mobi](http://www.mobilise-europe.mobi).

You should read it if you have the ambition to take your region to another level using mobile technology. In fact, all regions can gain from using mobile technology in order to boost their

existing industry and enable it to become more competitive in an international market. For those who have the ambition to improve their existing mobile industry, it provides the tools to help you achieve excellence.

This guide is filled with insights, experience, suggestions and recommendations. It also contains practical advice for those who want to start contextualising general recommendations to make them more specific to a certain region.

Want to know more?  
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