

3rd Learning Journey. Minutes of the days.¹

Dates: 17th and 18th of November 2017

Attached documents:

Meeting participants' signatures sheet (17th and 18th of April).

Presentations of each partner (see in MANUMIX's website:

<https://www.interregeurope.eu/manumix/library/>)

Objectives of the Learning Journey.

The Learning Journey was structured into two parts:

- Exchange of learnings' session:
 - Explanation of the situation of the monitoring system and indicators in each region. Each region explained a related "subtopic".
 - Explanation of the theory and good practices in the field of indicators.
 - Discussion among the partners (working groups)
- Discussion and organization of the project management:
 - Analysis of the project's state of situation.
 - Analysis of the project's state of situation in each region.
 - Establishment of a procedure to identify and elaborate good practices.
 - Definition of the content of the action plans to be developed at the end of phase I.
 - Organization of the 4th LJ in Wales.

Tuesday 17th April 2018

Location: Vilnius (FTMC - CENTER FOR PHYSICAL SCIENCES AND TECHNOLOGY)

Schedule: See agenda (<https://www.interregeurope.eu/manumix/events/event/1685/3rd-learning-journey/>)

Attendants:

- Ramojus Reimeris. MOSTA. Partner.
- Ieva Penelytė. MOSTA. Partner.
- Raminta Žemaitytė. MOSTA. Partner.

¹ The peer review session of the 18th of April 2018 it was an additional activity beyond the learning journey.

- Sinas Domauskas. MOSTA. Partner.
- Agnė Gaidamavičienė. Ministry of Education. Lithuanian stakeholder.
- Justinas Baužys. Vilnius University. Lithuanian stakeholder.
- Ričardas Valančiauskas. MITA. Lithuanian stakeholder.
- Pranciškus Vitta. Vilnius University. Lithuanian stakeholder.
- Biedsa Mantas. MITA. Lithuanian stakeholder.
- Alaitz Landaluze. Innobasque. LP
- Iñaki Ganzarain. Innobasque. LP
- Catalina Chamorro. Basque Government. Partner.
- Alberto Fernández. SPRI. Basque stakeholder.
- Iñaki Suárez. SPRI. Basque stakeholder.
- Cristiana Tabacco. Finpiemonte. Partner.
- Valentina Mastrullo. Finpiemonte Partner.
- Gavin George. Welsh Government. Partner.
- David Notley. Innovation Advisory Council for Wales. Welsh stakeholder.
- Kostas Stathoulopoulos. Nesta. Wales stakeholder.
- Edurne Magro. Orkestra. Advisory Partner.
- Mercedes Oleaga. Orkestra. Advisory Partner.
- Ainhoa Arrona. Orkestra. Advisory Partner.
- Román Ruiz. CDI Consulting. Technical Assistance.
- Eunatė Lambarri. CDI Consulting. Technical Assistance.

1. Monitoring and indicators in each region.

All partners made a presentation of the situation of the monitoring system and indicators in their region regarding the RDI instruments related with Advanced Manufacturing. Each partner presented one “subtopic”: Design of the monitoring system (Basque Country and Lithuania); gathering and analysing data (Piedmont) and visualization and reporting (Wales).

Basque Country (for further information see Exchange of Experiences_Basque Country <https://www.interregeurope.eu/manumix/library/>)

Basque Country’s representatives began the presentation explaining the 3 instrument in which the project MANUMIX is going to be focused: Gauzatu Industria, Industria 4.0 and HAZITEK.

After that, they explained the indicator used in each instrument. They explained both the indicators and what each indicator wants to measure. They also established other aspects they measure. Those additional aspects are the satisfaction of companies and ex-post result and impact indicators.

The most developed monitoring system is the programme HAZITEK due to its large number of indicators, including impact indicators through the so-called SIME system.

In order to set an evaluation system at policy mix level, it is necessary to work on the following areas:

- Indicators that measure the level of interaction among the programmes.
- Indicators to measure the joint contribution to Advanced Manufacturing.
- Indicators to measure the joint results and impacts ex-post.

Lithuania (for further information see Exchange of Experiences_Lithuania <https://www.interregeurope.eu/manumix/library/>)

The representatives of Lithuania explained their evaluation system. The origins of their evaluation system are the following monitoring systems:

- A monitoring system of the budget.
- A monitoring system of the Structural Funds.
- A monitoring system of the Smart Specialization Strategy.

The objective of MANUMIX is analysing the priorities but it would need information at level of policies and project.

Their evaluation system is a cycle that includes:

- Monitoring that includes monitoring and evaluation of Smart Specialization Strategy.
- Interim Evaluation that Includes evaluation of the Smart Specialization programme progress on relevance, effectiveness, efficiency, etc.
- Impact assessment that includes SMART Specialization programme final impact assessment (as ex-post)

Once the system was explained, the representative of Lithuania presented their indicators system. There are indicators at 4 levels: Input indicators, output indicators, outcome indicators and impact indicators.

They also defined the policy instruments in which they are using the indicators and monitoring system: Targeted scientific research in the field of Smart Specialization, Promotion of activities of Centres of excellence and Centres for innovation and technology transfer and Commercialization of R&D.

The main challenge in Lithuania are:

- How to assess the suitability of every policy instrument to achieve the strategic objective?
- How to assess the relative impact of every policy instrument?
- How to assess the degree to which every intervention is competing or is complementary in terms of contribution?

Piedmont (for further information see Exchange of Experiences_Piedmont <https://www.interregeurope.eu/manumix/library/>)

The representatives of Piedmont explained the design of their monitoring system, the data gathering and data analysis.

Regarding the monitoring system, they use 4 levels of indicators: Strategy indicators, sector indicators and results and output indicators.

The strategy indicators are statistical indicators. They set a baseline value and a target (objective) value. They define the situation and evolution of the economic context.

The sector indicators are defined at sectorial level. They work in 5 sectors aerospace, automotive, green chemistry, mechatronics and made in. They establish the level of innovation of the sector, provide further evidence regarding the possible effects of the Strategy on regional economic dynamics and pave the way to possible modifications to the S3 areas.

The results and output indicator are related to the policy instruments. Each policy instrument in which MANUMIX is focused has its own indicators. The result indicators are statistical indicators related to the strategy indicators.

In relation to the data gathering, they use different sources mainly external for instance data from statistical banks and information collected by beneficiaries. Only output indicators are elaborated directly by IRES Piedmont for the purpose of its data analysis.

They collect information “in itinere” and at the end of the project. They explained the objectives, types of evaluation and sources of information for each instruments related to MANUMIX.

Finally, they explained the data analysis. They use 3 types of analysis: implementation analysis, contrafactual impact analysis and case study. They explained what are the pros and cons of each type of analysis used.

The main conclusion is that there is not one single method for every policy. Each policy instrument must have their own indicators and specific analysis depending on its objectives, the context and the existing information.

Wales (for further information see Exchange of Experiences_Wales
<https://www.interregeurope.eu/manumix/library/>)

The representative of the Welsh Government explained how they gather data for monitoring and evaluation and report them visually to facilitate the understanding of information.

The aim of their system (Arloesiadur) is to communicate the information in an easy way to understand and to afford the viewer the opportunity to explore the data in a way that highlights patterns and relationships without obscuring the original underlying data itself.

The system allows communicating information at different levels: Ministry, Senior official, Regional entities, etc. The type of information offered and indicators used depends on the role of the person in defining or implementing the policy instruments.

There are 3 main sources: open data, web data and official data. In this manner, the information becomes more valuable for policy makers.

The most important aspect of the system is that it provides information in an easy, but visual way. Thus, the information is easier to understand by the different users.

The project is coordinated by the Welsh European Office that is responsible for monitoring and coordinating all the players: public, private, third sector involves in fostering R&D.

The main objective of this system is to provide relevant information to guarantee the investment in R&D explaining its impact in the economy. This is important to have quantitative data to explain the relevance of the R&D policy for the regional economy.

2. Theory behind monitoring and indicators and good practices

After the presentation of all the partners, Orkestra summarised the main conclusions highlighted in their presentation and compare the results achieved with those existent at European Union level.

The main conclusions for each topic analysed were the following ones:

Types of indicators to monitor individual instruments and potential indicators for policy-mixes.

- Good coverage in terms of quantitative indicators
- Potential to improve ex-post indicators and to advance towards a monitoring system of the policy-mix

Design of monitoring system, gathering and analysing data

- Strength in the triangulation of sources and methods.

- Potential to work on monitoring system of the policy mix.

Visualization and reporting.

- Different ways to visualize the results of monitoring results depending on the target group
- ICT and new methods are useful tools for this purpose

These conclusions were compared with the situation in Europe. The source of information is a survey developed on policy owners around Europe (Monitoring innovation and territorial development in Europe: emerging strategic management, European Planning Studies).

The main results of this survey related to the topics discussed in the LJ are the following ones:

- The result indicators are more frequently associated to the strategy first and then to the programmes and projects
- The main source of information is the statistical information followed by surveys, focus groups, etc.
- The stakeholders also provide relevant input for data collection
- Public and internal reports are the main dissemination channels put in practice.

These results are quite similar to those obtained by the partners analysing their own monitoring system and indicators.

Finally, Orkestra explained some guides and cases that could be interesting for the partners in order to improve their monitoring and evaluation system.

- Guidelines from the World Bank towards a monitoring system at different levels: policy, programme and instruments.
- Evaluation system of the RIS3 Galicia. This system defines a set of indicators (results, performance and impact), targets, monitoring tools and sources of information.
- S3 Platform that defines a proposal of indicators to be used in monitoring and evaluation.

3. Discussion: monitoring and indicators

After the resume of the analysis done by each partner, Orkestra lead a discussion about monitoring and indicators. The attendants participated in 3 working groups. Each group discuss about one topic of the LJ. After the discussion in the focus group all the participant shared their conclusion.

The main conclusions of each working group were the following ones:

Conclusions group 1. Design of the monitoring system

- Conclusions group 1. Design of the monitoring system

- You can't manage, if you don't measure.
- All the indicator should be driven by the policy you manage.
- Necessity to establish the goals (targets) at programme level.
- The quantities indicator are the most important, but qualitative information is important too.
- The importance to use in the future BIG DATA to collect and analysis data- Emerging area.
- Indicators are driven by the Structural Funds. That's determine the nature of indicators.

Conclusions group 2. Gathering and analysing data

- Gathering information is difficult. The enterprises don't know why is important to provide information.
- Importance to transmit the relevance of evaluation to the providers of information to collect data.
- Necessity to determinate the relationship between macroeconomic and microeconomic information.
- Necessity to Improve the qualitative information about the instruments and policies.

Conclusions group 3. Visualization and reporting

- A visualization and reporting system must be well designed, be self-explanatory and be balanced between the quantity of data provided and the simplicity of the information.
- The system must be adapted to the "customers". It is important to involve them in the definition of the system.
- The definition of a visualization system is an aspect in relation to the gathering and analysing data. The quality of data is a key aspect of the system.
- It is important to combine information and gather it in one place.

4. Good practices: what and how to report them?

CDI made a presentation about the identification and elaboration of the good practices. CDI reminded the partners that the project has as an objective identifying 8 good practices. To achieve this objective is necessary to submit the GP to the GP database and it must be approved by the JS and by a thematic expert. Only with this approval, an initiative can be consider as a good practice.

Also, CDI explained the procedure to identify and elaborate good practices in the project.

The elaboration of the good practices will be developed in 2 stages.

In the 1st one, CDI will write a draft proposal over 5 good practices previously identified.

- IR2. Industrialisation of Research Results. Piedmont.
- RIS3 Evaluation System. Lithuania.

- Innovation Specialists. Wales.
- Arloesiadour. Wales.
- Small Business Research Initiative (SBRI). United Kingdom.

These draft proposals will be submitted to the partners before the 4th of May. Each partner will be responsible of validating its practice and uploading it to the GP database.

In the 2nd stage, each partner must identify, elaborate and submit another good practice. Only Basque Country (2), Piedmont (1) and Lithuania (1) must elaborate good practices.

The deadline to identify those good practices is the 21st of May and the one to submit them to the GP database is the 4th of June.

In the 4th LJ, the partners will discuss other good practices that could have been identified and the procedure to elaborate them.

5. Study visit

All the partners visited two innovative companies of Advanced Manufacturing from. The companies visited were:

Brolis Semiconductors (<http://brolis-semicon.com>) A company focuses on the creation of infrared laser products from near infrared to mid infrared. The enterprise develops cutting-edge solutions for defense, security, medical, research and industrial applications.

Laser & Engineering Technologies Cluster LITEK (<http://litek.it>) is a cluster of companies related to laser and engineering technologies.

Wednesday 18th of April 2018

Location: Vilnius (FTMC - CENTER FOR PHYSICAL SCIENCES AND TECHNOLOGY)

Schedule: See agenda (<https://www.interregeurope.eu/manumix/events/event/1685/3rd-learning-journey/>)

Attendants:

- Ramojus Reimeris. MOSTA. Partner.
- Ieva Penelytė. MOSTA. Partner.
- Raminta Žemaitytė. MOSTA. Partner.
- Diana Kizalaite. LMT. Lithuanian stakeholder.
- Sinas Domauskas. MOSTA. Partner.

- Agnė Gaidamavičienė. Ministry of Education. Lithuanian stakeholder.
- Justinas Baužys. Vilnius University. Lithuanian stakeholder.
- Ričardas Valančiauskas. MITA. Lithuanian stakeholder.
- Pranciškus Vitta. Vilnius University. Lithuanian stakeholder.
- Eglė Miltakienė. LMT. Lithuanian stakeholder.
- Eglė Vizbaraitė. Central Project Management Agency. Lithuanian stakeholder.
- Biedsa Mantas. MITA. Lithuanian stakeholder.
- Alaitz Landaluze. Innobasque. LP
- Iñaki Ganzarain. Innobasque. LP
- Catalina Chamorro. Basque Government. Partner.
- Alberto Fernández. SPRI. Basque stakeholder.
- Iñaki Suárez. SPRI. Basque stakeholder.
- Cristiana Tabacco. Finpiemonte. Partner.
- Valentina Mastrullo. Finpiemonte Partner.
- Gavin George. Welsh Government. Partner.
- David Notley. Innovation Advisory Council for Wales. Welsh stakeholder.
- Kostas Stathoulopoulos. Nesta. Wales stakeholder.
- Eurne Magro. Orkestra. Advisory Partner.
- Mercedes Oleaga. Orkestra. Advisory Partner.
- Ainhoa Arrona. Orkestra. Advisory Partner.
- Román Ruiz. CDI Consulting. Technical Assistance.
- Eunat Lambarri. CDI Consulting. Technical Assistance.

1. Project situation: financial execution, indicators, etc.

Innobasque, as Lead Partner, after done a short description of the project, explained the general situation of the project at the end of the second semester (first year of execution): financial execution, indicators, state of situation of the joint technical report and next steps to be developed in the project.

The financial execution is below the objective established for 2017 (70%). This is mainly due to internal reorganisations in some of the partners (Welsh Government and MOSTA). It is necessary that each partner reschedules its budget to follow the spending plan. It is important to reach the objective in the budget line of staff cost because it shows the effort done on the project by partners.

All the activities that must to be finished by the end of year have been done. This causes that the situation of the performance indicators is quite positive. The unique indicator that shows a situation below the objective is the related to the peer reviews that has a little delay that is expected to correct in this semester.

The output indicators need to be improved. It is important to reach the objective of “good practices identified”. Innobasque remembered that they must be approved by the JS and the thematic expert before to be reported.

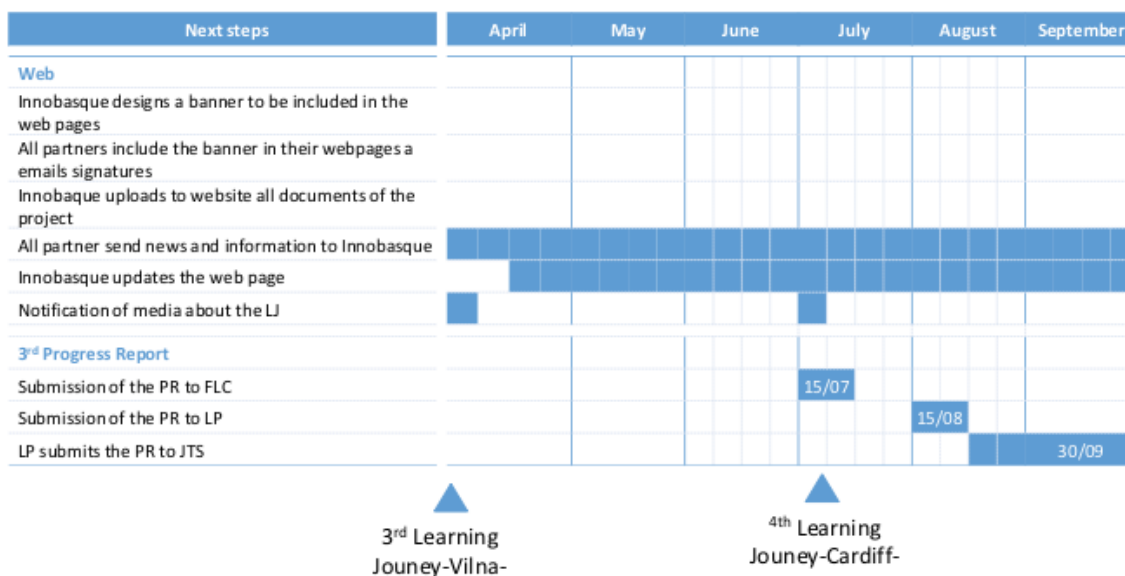
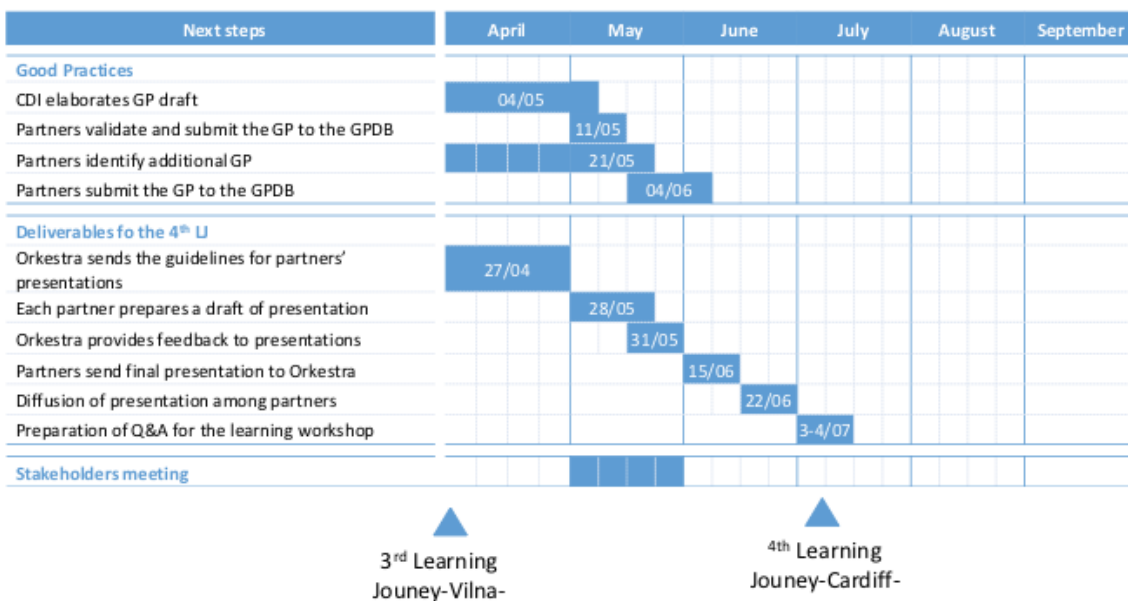
The communication indicators are also low. Innobasque presented a plan to improve that indicators. The activities purposed were the following ones.

	Innobasque	All Partners
Number of appearances in media (e.g. press)	<ul style="list-style-type: none"> ▪ Notifying the media about the FLJ and the final meeting in Brussels with the objective to reach additional publications in press 	<ul style="list-style-type: none"> ▪ Notifying the media about the Learning Journey located in its region with the objective to reach additional publications in press
Average number of sessions at the project pages per reporting period	<ul style="list-style-type: none"> ▪ To upload to the website all the documents related to each LJ, stakeholders meeting, etc. ▪ To update the website all the news related to the projects ▪ To design a banner to be included in all the partners’ websites and signatures of email ▪ To publish on Twitter all the news and information of the Project with a link to the website 	<ul style="list-style-type: none"> ▪ To provide Innobasque with news and information related to the Project to be upload to the website ▪ To incorporate the banner of Manumix in their websites and email signatures ▪ To retweet the content of the Project published by Innobasque in Twitter

Innobasque also reminded to the partners that they have defined some self-performance indicators that should be reached. The action plan should be focused on achieving those indicators.

In relation to the JPR, it has been submitted to the JS and we expect to receive soon a request for more detailed information. It is expected to be approved by the end of May.

Finally, Innobasque explained a plan with the activities that should be developed in the following months, before the meeting in Wales.



2. Action Plan

Orkestra explained the guide elaborated to define the action plans. This document was developed following the Interreg Europe Programme Manual.

Each region must elaborate an action plan by the end of 2018. This question is going to be discussed in-depth during the next learning journey.

The plan will define the actions to be developed. The content of the plan should be: background, actions, players involved, timeframe, costs and funding sources.

An action plan can be shared by two regions if they have common objective and their stakeholder groups agree. The actions can be action lines it is no necessary to define detailed actions.

The action plan is going to be monitored by the JS but it is not mandatory to reach the goals.

CDI will ask to the JST who must sign the action plan.

3. Situation of the project in each region: Comments about the 2nd stakeholder group meeting and the region's action plan approach

All the partners explained the tasks done before this meeting and the next steps to be developed.

Basque Country

In this semester Basque Country made the second stakeholder meeting and made the peer review with the partners of Lithuania.

At the end of the semester BC partners are going to change the communication activities, organize a new stakeholder meeting in May and participate in the second peer review in Lithuania.

They are thinking in the content of the action plan which will be focused on the evaluation system and indicator in relation with the instruments of MANUMIX projects. They want to work in the impact evaluation of the project.

Nowadays, they have some doubts about the focus of the action plan. There is not a decision taken about the topic in which the plan is going to be focused.

Piedmont

FINPIEMONTE needs to engage the region into the development of the project. They are going to contract IRES to facilitate the development of the project.

They made a meeting with the stakeholders group. They are interested in the project but they are not going to participate in the peer review.

It is previewed a stakeholder meeting in May. They are going to work also in the identification of good practices.

Wales

Welsh Government has already interiorized the project. One of the key aspects is the Brexit process. Despite this process, the Government wants to maintain collaboration with EU countries.

The work with the stakeholders has been intensive. The project has been explained to the innovation specialists. They are divulgating it among the enterprises.

Innovation Advisory Council is responsible for bringing together all the players in the field of innovation with the objective to influence over the innovation policies. They are thinking about the participation of all the innovation players if the strategy defined 5 years ago for implement the Structural Funds is still valid.

They have to define the strategy not only of R&D policies, but also all the competitiveness policies to improve the productivity and capacity of the enterprises. MANUMIX allows them to define the innovation strategy along the stakeholders.

Lithuania

They have established a deep relationship with the stakeholders. All are interesting in working together. They have been working in the peer review both in the one hosted in Bilbao and the other one celebrated in Vilnius.

They are going to develop individual meetings with the stakeholder. Their main problem is to define the policies.

They are delayed in the communication activities, due to the general delay of their activities.

4. Next steps: organisation of the 4th learning journey in Wales: evaluation of innovation policy-mixes.

The next LJ will be hosted in Cardiff the next 11st and 12nd of July. Currently, the Welsh Government is identifying the location and preparing the study visits.

Orkestra will send some guidelines to the organization of the meeting. Orkestra reminded the partners that the encounter will be used also to organise the peer review in which Lithuania and Wales are going to participate.

Orkestra will send a document in advance if any partner would like to add any comment. Also, the methodology is going to be discussed. These questions were discussed previously to the meeting. Depending of the methodology the planning and schedule will be defined.