



Learning document

Third learning pillar: Monitoring and indicators

Brief introduction

This document highlights the learnings that the MANUMIX partners have pointed out as the most relevant from the third learning journey held in Vilnius in April 2018 around the third MANUMIX pillar: **Monitoring and indicators**. These learnings are organised around different building blocks: learnings around types of indicators to monitor individual instruments and potential indicators for MANUMIX policy-mixes; learnings about the process of gathering and analysing data for monitoring and finally learnings about the visualisation of monitoring results.

The ideas reflected in this document come from different sources. First of all the presentation of the different topics made by MANUMIX partners during the learning journey constitute the basis for the learnings. In addition, the discussions that took place during those days and comments from all the MANUMIX partners and stakeholders that participated in the learning journey have fed this document.

Learnings around the types of indicators to monitor individual instruments and potential indicators for MANUMIX policy-mixes

There are different types of indicators to monitor individual instruments. In the field of innovation these are classified under the framework of input-outputs of the innovation process although others could be highlighted such as impact and process indicators. We could additionally distinguish between quantitative and qualitative indicators, with a predominance of the former ones in practice and between simple and composed indicators. As an example of this, the Basque Country presented the indicators implemented for measuring the three programmes selected for the MANUMIX projects and reflected on the type of indicators and the aim for measuring those. Two out of the three programmes focus on measuring efforts that is to say in input indicators such as number of applications, number of approved projects or expenditure executed. From its side, Hazitek programme puts more emphasis on result indicators (i.e. scientific publications) and on impact indicators to know the effectiveness of the intervention (i.e. jobs created/ saved or competitiveness degree). *To advance in the definition of impact indicators for individual programmes and also for the policy-mix is one of the issues that came out from the presentation and discussions. To this extent, the difficulty of defining indicators for policy mixes purposes was acknowledged by all the Manumix partners.*

In addition, in both the Basque and the Lithuanian presentation an interesting issue was highlighted which is how to link monitoring of the individual programmes with the Smart Specialisation Strategy as a whole.

Finally, the importance of not getting lost in many indicators but also the importance of measuring but with a specific goal was also a learning from the discussion as these statements show:

“You cannot manage what you don’t measure. You have to measure”

“Any indicator must be driven by a policy objective. It is important to define the objective: what is the goal? What is good? Sometimes you don’t know...”

Learnings about the process of gathering and analysing data for monitoring

In the learning journey the issue of gathering data was highly discussed and specifically, the challenges of how to collect reliable data.

Piedmont presented the different data sources they use for monitoring. The main source is official statistics followed by data from administrative documents and data from the beneficiaries (interviews, ad-hoc surveys, etc.).

One of the challenges associated with the process of gathering data directed from beneficiaries came out during the discussion:

“Companies don’t see the relevance of the information they provide. It is important to make them see that it has an aim, that it is relevant.”

“In addition, many institutions & departments ask information to companies so they are bored of providing info. This affects the quality of the information.”

Other issues such as the possibility of using big data and intelligence from public sources, and the importance of having the data and information updated for the reliability of the analyses were also mentioned during the journey.

With regards of the data analysis different techniques were discussed, some of them more linked to ex-post evaluation than to monitoring. In the case of Piedmont, qualitative methods such as case studies and interviews were proposed together with counterfactual analysis, more suitable for impact assessment than for monitoring. The rest of the partners agreed in the importance of combining quantitative and qualitative methods.

“We need to promote the incorporation and use of more qualitative techniques but still think quantitative measures are the most important ones.”

NESTA, an innovation foundation based in United Kingdom, presented an innovative project in collaboration with Wales Government. This project, Arloesiadur (www.arloesiadur.org) aims to map innovation in Wales using data from open sources and other webs to measure and visualise Wales’ industry, research and technology networks with the goal of informing policies. This project constitutes a good practice of using data for policy learning and also a good practice in visualisation, which we will develop more in the following section. Whereas this mapping provides a picture of trends and networks in Wales, using network analysis among other techniques, it does not make a specific link between trends and policy impact. It is therefore more an strategic intelligence tool than an evaluation one, which leads to one of the comments from partners in the meeting:

“It is very difficult and important at the same time to link macroeconomic data with the microeconomic data from projects to measure the policy impact.”

Learnings about visualisation of monitoring results

Sometimes the monitoring process fail because despite good data collection and analysis, these results are not well disseminated among the different groups of interests and not in the most adequate format.

The Wales government presented different ways of visualising data from monitoring processes. Indeed, different mechanisms could be used for visualising and reporting qualitative or quantitative data but the main focus should be on communicating results to stakeholders.

Among the different examples that were presented we could distinguish different approaches depending on the object to communicate and to whom. Examples of showing different results from Wales within a geographic perspective (in UK panorama, EU perspective) were provided. In addition examples of how to show impact analysis to stakeholders were also showed.

Comments from the discussion groups agreed in the importance of the following issues:

“It is really relevant the good design of the visualization in order it is self-explanatory, including a balance between complexity and simplicity, using interactive tools and more important to involve policy-makers in the design to approach the design to their needs.”