



# Transfer methodology and plan

## Deliverable 4.2.1 (Fourth progress report)

Responsible Partner: Eurecat

31.03.2019



<b>Project Acronym:</b>	GREENOMED
<b>Project full title:</b>	Mediterranean Trans-Regional Cooperation for green manufacturing innovation
<b>Priority Axis:</b>	Promoting Mediterranean innovation capacities to develop smart and sustainable growth
<b>Objectives:</b>	1.1 To increase transnational activity of innovative clusters and networks of key sectors of the MED area
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<b>Work Package:</b>	WP 4 – Transferring
<b>Activity:</b>	A.4.2 Transfer activities design and planning
<b>Summary:</b>	The deliverable defines the transfer approach, format and workplan within the project, as well as potential benefits from a wider transfer in the MED area.
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## Revision History

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## List of abbreviations

GG: Green Growth

kOM: Kick-off meeting

PO: Project Officer

SYNNGI: Synergies for Green Growth Initiatives (Horizontal project of Green Growth Community

Tbc: To be concreted

Tbd: To be defined

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## 1. Executive summary

Eurecat is responsible for the preparation, coordination and management of the task 4.2 Transfer activities design and planning in the Greenomed project. In this task a common approach and format to transfer testing results will be defined, based on the transfer tools developed in WP3. Relevant targets for transfer (i.e. Cluster external to the Consortium that can impact on and benefit from green manufacturing innovation) will be identified in each Region. Additionally to Clusters, the transfer will be made to Regional Authorities that will participate to the project as Associate Partners. A detailed transfer workplan to the identified targets will be then defined in all the concerned Regions. An analysis will be carried out to outline the potential impacts of a wider transfer of project results in the MED area, in order to assess the benefits and prepare the field to future capitalization actions.

The deliverable will be a report (in the format of a Word document in English language) describing transfer approach, format and workplan within the project, as well as potential benefits from a wider transfer in the MED area.

## 2. Transfer Methodology

### 2.1. Preliminary steps

At the end of September 2018 Eurecat started with the definition of the transfer methodology. To have clear ideas of how the transfer methodology and plan should be Eurecat identified the main initial aspects to be considered:

- **Objectives:** To transfer the GREENOMED methodology, services and tools tested in WP3 and optimized according to testing results to external clusters and regional authorities.
- **Results:** At the end of the GREENOMED project the external clusters should be able to use GREENOMED methodology and animate interregional cooperation in Green Manufacturing within their associates in their territory. Moreover, regional authorities should have well understood the importance of Green Manufacturing in the regions as well as the needed support of regional administrations to establish successful cooperation among regions for boosting regional competitiveness.
- **Target groups:** Two clear target groups are the beneficiaries of the transfer actions:
  - Other clusters external to the Consortium (4 actions)
  - Regional authorities (associate partners) (8 actions)
- **Partners' involvement:** Although only 4 actions to external clusters are mandatory all partners should be active in this activity as the objective is to involve as maximum clusters as possible in the transferring process to ensure the GREENOMED methodology adoption. Each partner is also responsible for the transfer action to its regional authority.
- **Period for implementation:** The initial period for implementation of the Transfer Methodology was from October until July. However, in December 2018 the partnership

agreed on extending the project 6 months. This gave the space to widen the period for the implementation of the Transfer Methodology until December 2019.

## 2.2. The Transfer methodology

### 2.2.1. Initial version

Once the fundamental aspects were tackled, Eurecat proposed an initial Draft of the Transfer Methodology to be worked out with CNR-STIIMA.

In this first draft, the Transfer methodology consisted of 4 steps:

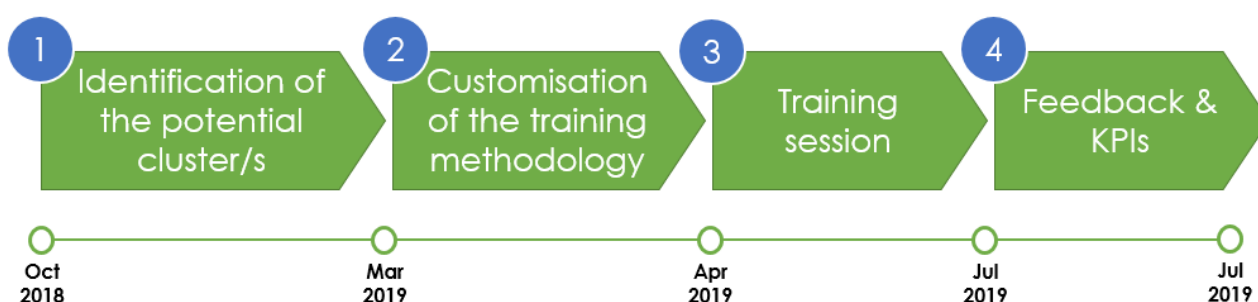


Figure 1. First proposal of steps of Transfer Methodology

As shown in Figure 1, the 4 steps of the methodology were distributed between October 2018 and July 2019.

#### 1<sup>st</sup> step. Identification of the potential cluster/s

This first step had the aim to identify the beneficiaries of the transferring activity. They could be clusters or other entities performing similar ecosystem orchestration activities.

The proposed activities to perform the step were the following:

- ✓ To map the clusters in the region or country (depending on the partners' scope)
- ✓ To identify and characterize the clusters (people, scope of activities and topics targeted)
- ✓ To contact them, engage them and collect interest in being involved in the transfer methodology

For this step some tools were identified to be provided by Eurecat:

- ✓ Excel sheet for identification of clusters
- ✓ Greenomed communication toolkit

CLUSTER	REGION	TOPIC OF INTEREST	#ASSOCIATE COMPANIES

Figure 2. Excel sheet to identify the external clusters



Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: to identify regional clusters and engage them.
- ✓ External clusters: to contribute with information to complete the characterization of its entity.

## **2<sup>nd</sup> step. Customisation of the training methodology**

This second step had the aim to tailor the training methodology to be performed in each region according to each region condition. Starting from a general training methodology framework, to concrete the procedures following established criteria.

The training methodology to be performed by each partner was the following:

- ✓ 1 event. In case of more than one cluster identified, decide if better to perform one-to-one meetings instead of joint event.
- ✓ Duration: <3h
- ✓ Participants: one or more clusters or similar entities
- ✓ Draft agenda:
  - Framework of GREENOMED and explanation of GREENOMED project. Other linked opportunities (VI, DIH...) and regional initiatives.
  - Methodology, tools and materials available.
  - Successes stories and failures.
  - Hands-on exercise using them.
- ✓ External support. If necessary, one core partner (CNR, EURECAT or AFIL) will support the event with additional information

For this step some tools were identified to be provided by Eurecat:

- ✓ Events template (in English) including general GREENOMED information, the GREENOMED methodology and tools and a set of success and failure stories.
- ✓ GREENOMED toolkit
- ✓ GREENOMED methodology tools available

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: In case of more than one cluster identified, decide if better to perform one-to-one meetings instead of joint event.
- ✓ External clusters: To attend and attract other clusters and interested entities to the event

## **3<sup>rd</sup> step. Training session**

This third step had the aim to implement the training event tailored in step 2 in order to transfer the GREENOMED methodology and tools.

The proposed activities to perform the step were the following:

- ✓ To set the date for the event and send invitations
- ✓ To coordinate with Core Partners for any clarification and possible support.
- ✓ To implement the event and collect evidences (agenda, attenders, photos)

For this step some tools were identified to be provided by Eurecat:

- ✓ Invitation template (in English)
- ✓ Greenomed communication toolkit

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: to prepare and manage the event and participants.
- ✓ Core partners: to give support to training events in case necessary
- ✓ External clusters: to participate to the events and engage other interested entities.

#### **4<sup>th</sup> step. Feedback and KPIs**

This final step had the aim to collect the feedback of the transferring events performed in order to improve them and related materials. To collect impact indicators of the events.

The proposed activities to perform the step were the following:

- ✓ To collect feedback from participants of the training session.
- ✓ To report conclusions of the event
- ✓ To collect and report KPIs of the events

For this step some tools were identified to be provided by Eurecat:

- ✓ Satisfaction questionnaire template
- ✓ KPIs list

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: to collect and send required information.
- ✓ External clusters: to contribute with satisfaction questionnaire.

#### **2.2.2. Second version**

CNR-STIIMA gave its feedback of the first draft and included more steps in the process:

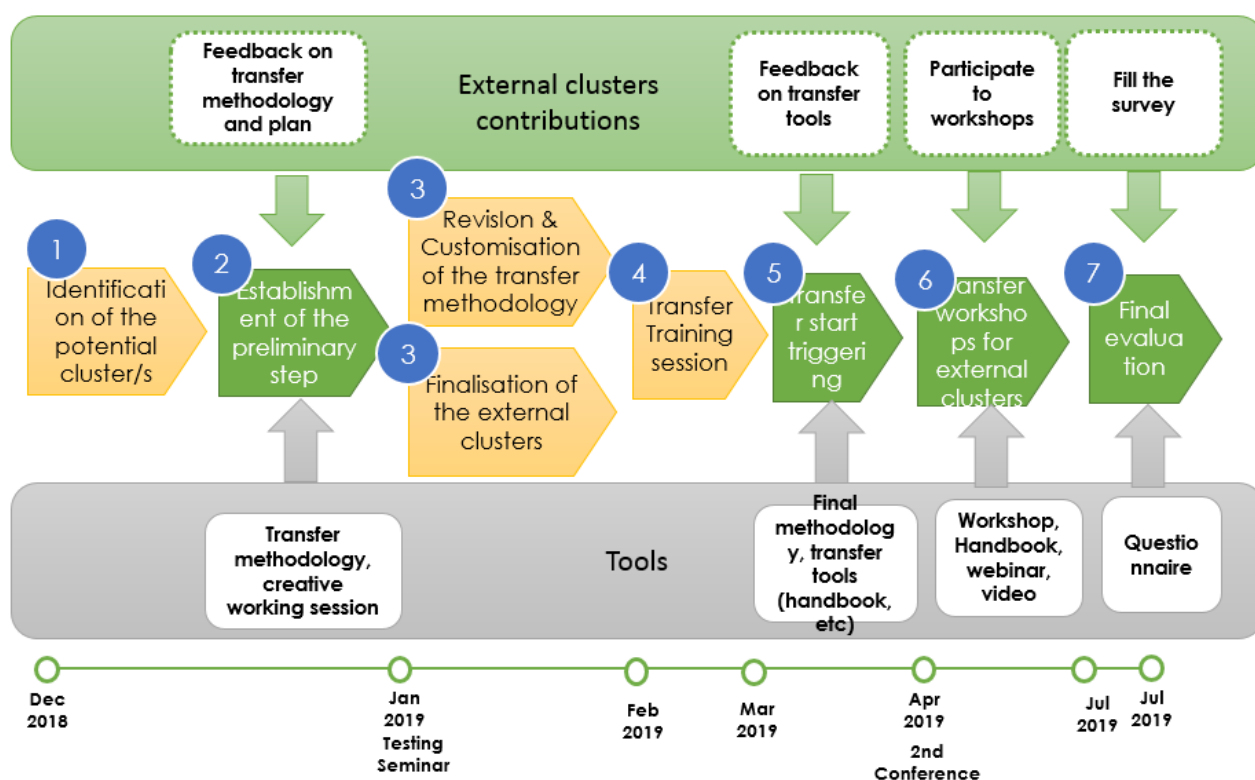


Figure 3. Second proposal of steps of Transfer Methodology

The proposal was focused on concreting on the activities to be performed during the whole methodology steps and clearly showing which activities were assigned to each profile involved in the Transfer process.

In this regard, 7 steps were identified:

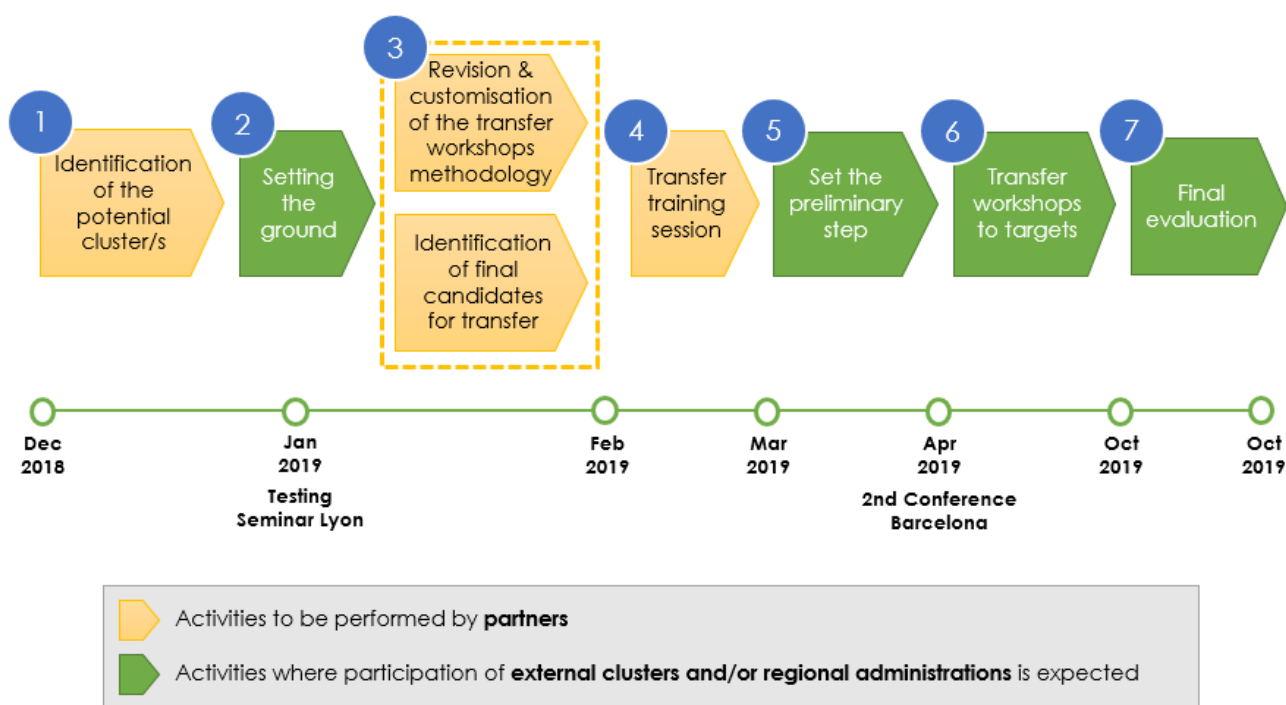
- **1<sup>st</sup> step. Identification of potential clusters:** This first step was focused on identifying the potential clusters to involve in the transferring process.
- **2<sup>nd</sup> step. Establishment of the preliminary step:** This second step was focused on starting to do the initial approach to the clusters already identified by presenting the project and identifying their need for the future transfer session.
- **3<sup>rd</sup> step. Revision & Customisation of the transfer methodology. Finalisation of the external clusters:** This third step was focused on adapting the general transfer session approach to the needs of each region according to some parameters and to continue with the identification of external clusters to whom do the transfer.
- **4<sup>th</sup> step. Transfer Training session:** This fourth step was focused on transferring the knowledge of the Transfer methodologies to the GREENOMED partners.
- **5<sup>th</sup> step. Transfer start triggering:** This fifth step was focused on having a session with potential clusters and regional administrations to present the transferring actions and give a taste of what this actions will be in next months.

- **6<sup>th</sup> step. Transfer workshops for external clusters and regional administrations:** This sixth step focused on the specific transferring actions that external clusters and regional administrations would receive from GREENOMED partners.
- **7<sup>th</sup> step. Final evaluation:** This seventh and last step focused on the evaluation of the transfer workshops from the perspective of the beneficiaries of the transfer methodology.

### 2.2.3. Final version

After commenting on the second version and considering that the transfer methodology should be easily understood, a final version was conceived.

This transfer methodology was presented to the partners on December 4<sup>th</sup> 2018.



**Figure 4. Final version of Transfer Methodology**

As shown in Figure 4, the 7 steps of the methodology were distributed between December 2018 and October 2019.

#### 1<sup>st</sup> step. Identification of the potential cluster/s

This first step has the aim to identify the beneficiaries of the transferring activity. They could be clusters or other entities performing similar ecosystem activities.

This step should be performed by the GREENOMED partners.

The proposed activities to perform the step were the following:

- ✓ To map the clusters in the region or country (depending on the partners' scope)

- ✓ To identify and characterize the clusters (people, scope of activities and topics targeted)
- ✓ To contact them, engage them and collect interest in being involved in the transfer methodology

For this step some tools were identified to be provided by Eurecat:

- ✓ Excel sheet for identification of clusters
- ✓ Greenomed communication toolkit

CLUSTER	REGION	TOPIC OF INTEREST	#ASSOCIATE COMPANIES

Figure 5. Excel sheet to identify the external clusters

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: to identify regional clusters and engage them.

The first step started in December 2018 by sharing the excel sheet with the partners to identify the first potential list of external clusters to engage in transferring process. The activity will conclude in January 2019 before the GREENOMED testing seminar.

## 2<sup>nd</sup> step. Setting the ground

This second step has the aim to present, discuss and get feedback from external clusters of the methodology and transfer process to design the final transfer procedures.

This step should be performed by the external clusters.

The proposed activities to perform the step were the following:

- ✓ To participate in a working session to get the feedback on the mentioned topics

The training methodology to be performed by each partner was the following:

- ✓ 1 event. In case of more than one cluster identified, decide if better to perform one-to-one meetings instead of joint event.
- ✓ Duration: <3h
- ✓ Participants: one or more clusters or similar entities
- ✓ Draft agenda:
  - Framework of GREENOMED and explanation of GREENOMED project. Other linked opportunities (VI, DIH...) and regional initiatives.
  - Methodology, tools and materials available.
  - Successes stories and failures.
  - Hands-on exercise using them.
- ✓ External support. If necessary, one core partner (CNR, EURECAT or AFIL) will support the event with additional information

For this step some tools were identified to be provided by Eurecat:

- ✓ Invitation letter
- ✓ Greenomed communication toolkit
- ✓ Transfer methodology
- ✓ Creative working session toolkit

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners and external clusters: to attend the event and provide inputs of the transfer workshops methodology and tools, and usability and applicability of GREENOMED methodology.

The second step will take place during the testing seminar in Lyon on 29 January 2019 in which the external clusters will be invited to the seminar and the GREENOMED methodology will be explained to them briefly to collect their first impressions and feedback.

### **3<sup>rd</sup> step. (a) Revision & customisation of the transfer workshops methodology**

This third step has the aim to tailor the transfer workshops methodology to be performed in each region according to each region condition.

This step should be performed by GREENOMED partners.

The proposed activities to perform the step were the following:

- ✓ Starting from a general transfer workshops methodology, to concrete the procedures following established criteria.
- ✓ To coordinate with Core Partners for any clarification and possible support.

For this step some tools were identified to be provided by Eurecat:

- ✓ Preliminary transfer workshops template (in English) including general GREENOMED information, the GREENOMED methodology and tools, and a set of success and failure stories.
- ✓ GREENOMED communication toolkit

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ Core partners: to support the process of transfer workshops customization.
- ✓ All partners: to customize the transfer workshops according to their regions

### **3<sup>rd</sup> step. (b) Identification of final candidates for transfer**

In parallel with the first level of the third step, the second layer of the third step has the aim to identify the final beneficiaries of the workshops transfer activity. They can be clusters or other entities performing similar ecosystem activities.

This step should be performed by GREENOMED partners.

The proposed activities to perform the step were the following:

- ✓ To update the identification and characterization of the clusters (people, scope of activities and topics targeted) in the region or country
- ✓ To contact them, engage them and collect interest in being involved in the workshops transfer methodology.

For this step some tools were identified to be provided by Eurecat:

- ✓ Excel sheet for identification of clusters
- ✓ Greenomed communication toolkit

CLUSTER	REGION	TOPIC OF INTEREST	#ASSOCIATE COMPANIES

Figure 6. Excel sheet to identify the external clusters

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: to identify regional clusters and engage them.

The third step will start after the testing seminar in Lyon in February 2019 by analyzing the collected input from external clusters during the testing seminar transfer working session.

#### 4<sup>th</sup> step. Transfer training session

This fourth step has the aim to implement a training session to partners to transfer them the tools and methods that should help them when performing the regional transfer workshops to external partners.

This step should be performed by GREENOMED partners.

The proposed activities to perform the step were the following:

- ✓ To prepare the tools and materials for the transfer training session.
- ✓ To set the date for the transfer training session (in principle on-line)
- ✓ To implement the transfer training session to partners and clarify any doubt it may occur.

For this step some tools were identified to be provided by Eurecat:

- ✓ Transfer training session toolkit (presentation and supporting tools to be used by partners in the regional transfer workshops)

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ Eurecat: to prepare and implement the transfer training session with support of Core Partners.
- ✓ All partners: to attend the transfer training session (in principle on-line)

This step will take place between February and March 2019 to train the cluster partners of the consortium.

### **5<sup>th</sup> step. Set the preliminary step**

This fifth step has the aim to gain more knowledge of GREENOMED methodology and benefits from the companies' perspective.

This step should be performed by external clusters.

The proposed activities to perform the step were the following:

- ✓ To attend the 2nd GREENOMED conference set on the 11th April 2019 in Barcelona focused which targets industrial companies.
- ✓ To participate in the specific workshop dedicated to clusters within this conference

For this step some tools were identified to be provided by Eurecat:

- ✓ Invitation template (in English)
- ✓ Final transfer workshops materials and tools (including a handbook)
- ✓ GREENOMED communication toolkit

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: to attend the event.
- ✓ External clusters: to participate to the events.

This step will take place between March 2019 and April 2019. The concluding activity will take place in the second GREENOMED conference in Barcelona in April.

### **6<sup>th</sup> step. Transfer workshops to targets**

This sixth step has the aim to implement the training event tailored in step 3 in order to transfer the GREENOMED methodology and tools.

This step should be performed by GREENOMED partners, external clusters and regional administrations.

The proposed activities to perform the step were the following:

- ✓ To set the date for the event and send invitations
- ✓ To coordinate with Core Partners for any clarification and possible support.
- ✓ To implement the event and collect evidences (agenda, attenders, photos)

For this step some tools were identified to be provided by Eurecat:

- ✓ To set the date for the event and send invitations



- ✓ To coordinate with Core Partners for any clarification and possible support.
- ✓ To implement the event and collect evidences (agenda, attendees, photos)

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: to prepare and manage the event and participants.
- ✓ Core partners: to give support to training events in case necessary
- ✓ External clusters: to participate to the events and engage other interested entities.
- ✓ Regional administrations: to participate to the events.

After the GREENOMED conference in April in Barcelona, the partners will start implementing this step of transferring methodology by organizing dedicated regional/national workshop to transfer the methodology. This phase will continue till the end of the project.

### **7<sup>th</sup> step. Final evaluation**

This seventh step has the aim to collect the feedback of the events in order to improve them and related materials. To collect impact indicators of the events.

This step should be performed by GREENOMED partners.

The proposed activities to perform the step were the following:

- ✓ To collect feedback from participants of the training session.
- ✓ To report conclusions of the event
- ✓ To collect and report KPIs of the events

For this step some tools were identified to be provided by Eurecat:

- ✓ Satisfaction questionnaire template
- ✓ KPIs list

Finally, the roles and responsibilities of partners, external clusters and regional administrations were described to easily understand the scope of actions for each profile:

- ✓ All partners: to collect and send required information.
- ✓ External clusters: to contribute with satisfaction questionnaire.

This step will start in the final phase of the project when the transfer workshops take place. This phase will be concluded at the end of the project.

### 3. Potential capitalisation of results

#### 3.1. Results of GREENOMED project to be capitalised

At the end of GREENOMED project, we will deliver several outputs, which are summarised below:

##### i. GREENOMED methodology, services and tools

GREENOMED main output is the GREENOMED methodology including set of cluster services and tools. The GREENOMED methodology is being tested among GREENOMED partners and will be revised at the end of the project according to testing results. The GREENOMED methodology has been conceived to help regional ecosystems to identify key topics in their regions in line with their RIS3 strategy around which to build stable working groups that will lead to develop pilot plants including relevant advanced technologies related to key topics at >TR6 working in an interconnected way with other pilot nodes throughout Europe. Under this light, the GREENOMED methodology has been developed and tested for Green Manufacturing topics but it can be potentially adapted and extended to other fields.

The methodology consists of different steps, from 0 to 7, in a process to finally develop a pilot plant, as shown in Figure 7.

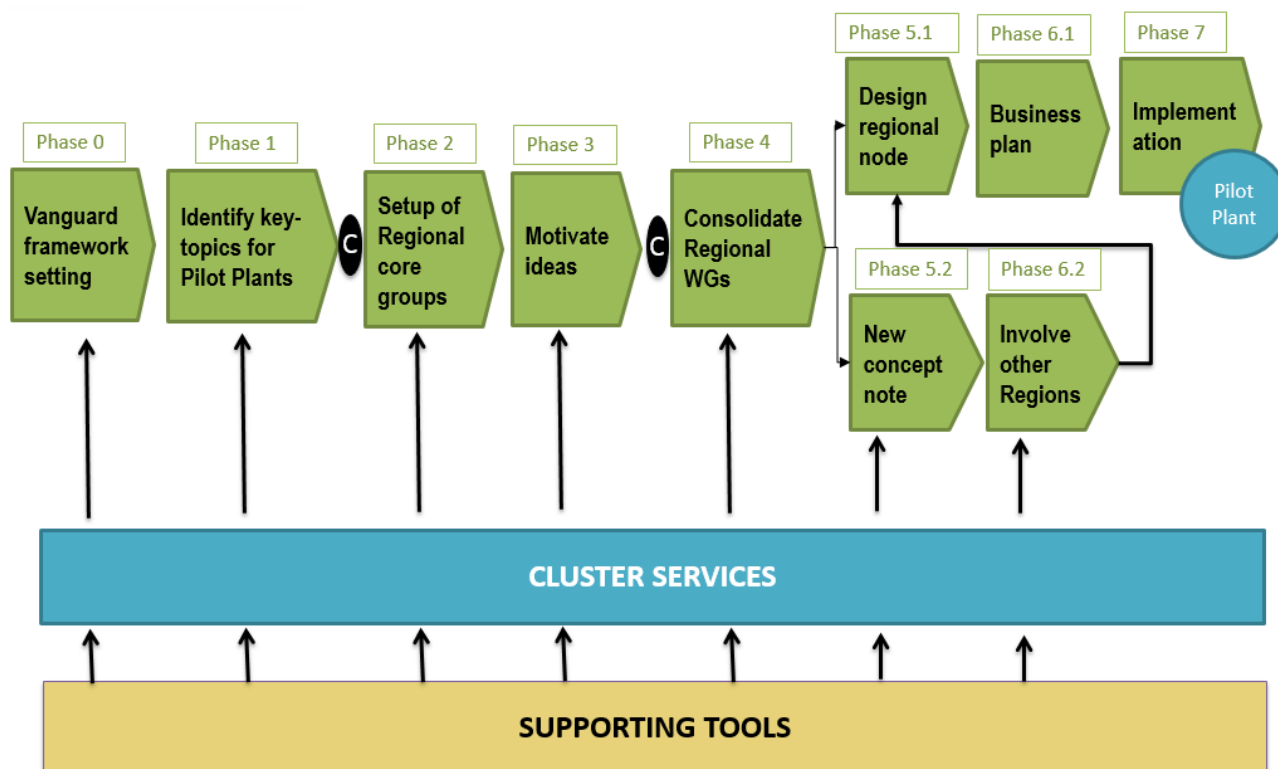


Figure 7. GREENOMED methodology overview

For each step, a set of cluster services has been identified and related supporting tools to provide these services have been developed. The details of the GREENOMED methodology are defined in D3.2.1.

The GREENOMED methodology, the cluster services to be provided to put in practice the methodology and the tools that will support the implementation of the methodology are the core content that will be transferred to external clusters in MED regions to spread the use of these successfully tested GREENOMED outputs. Moreover the results of the testing of GREENOMED activity will be transferred to regional authorities and policy makers in order to create an institutional framework to support the designed/work in progress concept notes of pilot plants for green manufacturing

## **ii. Testing experiences of GREENOMED partners**

The major part of the GREENOMED project has been focused on testing the GREENOMED methodology by GREENOMED partners that hadn't gone through this process before. This has provided several stories that the 5 regions involved have experienced throughout the testing process, all different from one another. These experiences will let us to improve and fine-tune the GREENOMED methodology and tools that have been developed at the beginning of the project.

At the end of the project we will have 5 different use cases of the 5 regions involved:

- Croatia
- Central Macedonia (Greece)
- Rhone Alps (France)
- Slovenia
- Marche (Italy)

## **iii. GREENOMED handbook**

Another relevant output generated from the GREENOMED project is the GREENOMED handbook. This handbook is the main transferring tool and has the mission to engage other MED regions to go through the same process that GREENOMED testing partners have experienced by using the GREENOMED methodology as well as to convince the administrations of the related regions of the importance of the interregional cooperation to boost the regional competitiveness of companies. The handbook will act as a user manual for external clusters who will receive the GREENOMED methodology during the transferring process and will help them to understand the methodology, services and tools and how to implement them in practice.

The GREENOMED handbook summarises in an attractive way:

- The context and the background upon which the GREENOMED methodology has been built, and its origins in Vanguard Initiative
- An overview of the GREENOMED methodology, its target users, the cluster-driven services and the supporting tools to implement the methodology.
- The 5 "implementation stories" that the 5 partner regions have experienced from a perspective that will allow readers of each region to mirror themselves in one of them. The use cases will highlight their regional ecosystem, the starting point and their own features that determine and affect implementation of the GREENOMED methodology and the benefits that each region has obtained by implementing it, showing an easy-to-follow storytelling.

- A set of lessons learnt and recommendations, pointing out the main barriers occurred when implementing the GREENOMED methodology from the experiences of the testing partners and the core partners (Eurecat, CNR-STIIMA and AFIL), as well as the recommendations to the main targets of GREENOMED methodology: the clusters and the regional administrations.

#### iv. GREENOMED transferring process

Finally, the Transferring process and methodology that has been defined to transfer the results to the main target users of the GREENOMED methodology is a valuable output of the project.

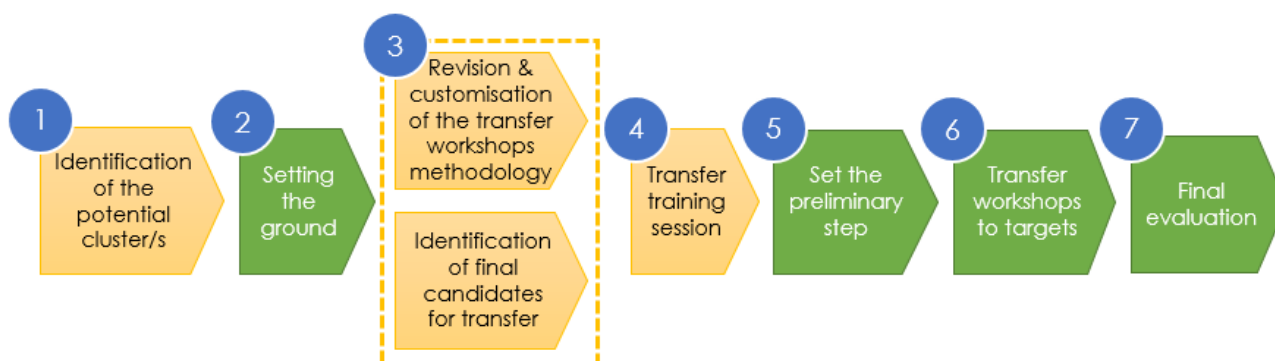


Figure 8. GREENOMED Transfer Methodology

Principally, the transfer workshops to main targets (clusters and regional administrations), which will be defined collecting the feedback of external clusters and regional administrations, and customised according to the needs of each region, is of added-value. At the end of the project there will be 7 different approaches of implementing the GREENOMED transferring methodology departing from a general methodology that will be adapted to each region following a series of set parameters.

### 3.2. Plan for capitalisation of these results

The GREENOMED project is clearly a project where capitalisation is almost mandatory. The 4 main outputs of GREENOMED project mentioned in section 3.1 are well-defined tools ready for the capitalisation process.

In GREENOMED, 5 regions have been beneficiaries of the GREENOMED methodology, with proven benefits in terms of:

- Organising the regional innovation ecosystem, especially in the Green Manufacturing area.
- Fostering the use of RIS3 regional specialisation to trigger regional strategic actions that increase the regional competitiveness
- Mobilising key actors in the regions (public administrations, clusters and companies) that come together for the benefit of the region
- Interregional cooperating with other entities with similar technological interests for sharing good practices, solving needs and achieving multiplying effects.

Therefore, the GREENOMED generated outputs can be used for helping other MED and European regions far from the interregional cooperation in Green Manufacturing to follow the process defined in GREENOMED methodology.

Especially MED regions, in part due to their distance to Central Europe and in part due to their regional ecosystem, are in most cases far from going through this process, and even more if they should do it alone. Experts in mentoring these regions in GREENOMED methodology such as CNR-STIIMA, EURECAT or AFIL are in these cases more than needed although having the 4 outputs mentioned freely available.

In GREENOMED we will be ready to help other MED regions in the process of implementing GREENOMED methodology. There is already proven interests of other regions in going through this process. In fact already a preliminary step towards capitalisation of GREENOMED project has taken place through organising the first GREENOMED political event on 3 December 2018 in Brussels where apart from partner region, other MED regions such as PACA region, Tuscany, Valle d'Aosta, Trentino Alto Adige, etc joined the event. The GREENOMED methodology and experience of testing partners were presented during the event as a first step towards capitalization.