+RESILIENT- Mediterranean Open REsouRcEs for Social Innovation of SociaLly ResponsIve ENTerprises

PILOT ACTION EXECUTIVE PLANS

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DELIVERABLE SUMMARY	
PROJECT INFORMATION	
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1. Introduction

1.1. Project Description

The project +RESILIENT puts together a 4-helix partnership of eight MED countries to tackle the need for innovation conducive to increased socially responsive competitiveness of SMEs and stimulate new jobs, especially for companies operating in the social economy. It aims to kick-start a process of policy change at regional level in the involved areas resulting in the integration of successful elements into the new Cohesion policy (EU2020+). The overall objective is to positively influence, adapt/change the different structural elements of policy governing "clusters with high social vocation and responsiveness" (SVRC) by leveraging on innovation dynamics led by technology, open data & successful models with social relevance & impact, creating socially-responsive value chains at a transnational level.

SVRC are usually codified only at local level, so the project addresses the transnational dimension as networking and capacity building approach to achieve a critical mass, increase horizontal opportunities for SMEs, mobility, employability and for scaling up into Cohesion Policy and Funds.

+RESILIENT is an integrated project that establishes a structural approach to policy & practice improvement of emerging dynamics in social innovation through an overarching process based on the intertwined use of open data & the creation of a transnational socially responsive value chain. This includes studying existing initiatives, adapting and testing, with the final objective of capitalizing them in the MED area.
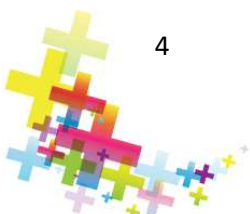
To achieve the planned objectives, the partnership will produce the following results:

- SVR Clusters implement sets of innovative transnational /common policies/operations,

- SVRCs become integrated elements and measures of mainstream policy and funding,

- SVRC generate jobs, skills and social cohesion,

- SVRCs respond better to socially driven market requirements in different sub-sectors and in other MED areas.

1.2. Purpose of the document

After the data and information collection, that has characterized the first module of +RESILIENT project, scope and use-case scenarios at local level in countries involved have been identified, to create goal-oriented and structured actions that can be configured as plans for the testing phase.

Testing aims at selecting, implementing at a small scale and assessing the use-case scenarios defined in order to verify the effectiveness of +RESILIENT approach on several aspects. For this

reason, piloting is necessary to gain insight on actual implementation of identified innovative measures and to increase, through evidence collected from their evaluation, the transfer and capitalization actions.

Different activities have been carried out to define pilot action executive plans as a collaborative effort. The information gathered in these activities has been documented in a poster and in a report for each region or area de operations involved in the project, which will implement one or more pilot actions. The name of the report is "D4.3.2. Template for executive action plans".

The objective of this document is to carry out a synthesis of all reports, and from that information, to perform an analysis of it and extract the main conclusions obtained.

1.3. Document structure

This deliverable is structured as follows:

- Section 1 y Section 2 introduce the background and the main concepts that make it possible to understand the rest of the document.
- Section 3 exposes the methodology followed to carry out the collection of information from the pilot actions to be implemented.
- Section 4 describes the sources of the data on which the pilot action executive plans are based.
- Section 5 presents characteristics of the pilot actions to be implemented.
- Section 6 provides an analysis of the result indicators that pilot action.
- Section 7 shows a schedule of the pilot action executive plans.
- Section 8 present the main conclusions.
- Finally, Section 9 contains detailed implementation plans for the pilot actions of the regions involved.

2. Background

The main objective of +RESILIENT is to better understand the societal needs and to overcome obstacles in order to create and put in practice services, tools and methods that strengthen the SVR Clusters in order to provide answers to growing and diversified social needs – also leveraging on the potential of open data and resources – in an interactive way.

After the collection of data and information that has characterized the first part of M1 of +RESLIENT project, scope and use-case scenarios at local level in countries involved have been identified. Use-case scenarios are typical documents used by software developers to design

software or apps. For the purposes of +RESILIENT, this method has been adopted because use case scenarios allow to include requirements and functions related – among other things - to the use of open data and open resources and, through the adaptation of a template, to create goal-oriented and structured actions that can be configured as plans for the testing phase.

Testing aims at selecting, implementing at a small scale and assessing the use-case scenarios defined in order to verify the effectiveness of +RESILIENT approach on current frameworks and regional context, organizational, process and service innovation and impact on direct and indirect target groups. Piloting is therefore necessary to gain insight on actual implementation of identified innovative measures and to increase, through evidence collected from their evaluation, the transfer and capitalization actions.

As in each country or area of operations, the testing of one or more use-case scenarios will be carried out, pilot action executive plans have to be configured and developed as a collaborative effort focusing on the three macro scenarios.
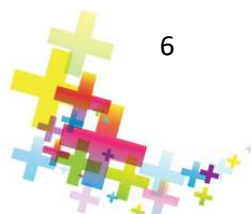
Testing phase addresses the feasibility and the concrete application of the co-designed model in the delivery of innovative public services (social entrepreneurship development, e-health, vulnerable groups, long-term unemployed, migrants and refugees etc.), support to SMEs with social vocation and responsiveness: (businesses linked to smart specialization, ex: social farming, sustainable tourism etc.) and capacity building of social enterprises, sharing economy, third sector, citizens' organizations, crowdfunding initiatives etc.

Pilot actions and testing will include three levels of implementation and target groups: policy makers, intermediaries (service providers, support and research), and companies with social vocation and responsiveness. In order to embed transferability and capitalization, each pilot action will:

1. Use open data and PSI as defined in WP3
2. Make clear reference to the policy framework that it aims at improving/changing (ex: RIS3, ESI Funds, local or national policy framework);
3. Refer to the common scenarios defined to facilitate transfer afterwards;
4. Involve different stakeholders and participatory approaches for co-creation or co-implementation;
5. Include a transnational element that highlight the added value of the transnational cooperation (i.e. at least two pilot actions in two countries will focus on the same scenario)

3.   Methodology

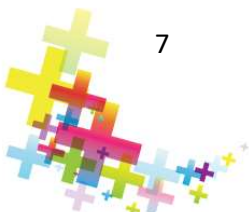This section exposes the methodology followed for conducting the pilot actions executive plans.

As already done to conduct the assessment of the economic situation of the project partners in WP3 Studying, the *Systematic Literature Review*[1] method to define the pilot action executive plans has been followed. This process is composed by three stages: planning, conducting and reporting.

- **Planning:** in this stage, the pilot action plans collection strategy is defined to include aspects such as the data to collect:

    a) *Features of the pilot action:* name, area/territory involved, scenario, type of action, aim of the pilot action, outcome/change envisioned as a result of the pilot action, general description of task and activities, stakeholders and players to involve, target group, responsibilities and roles, results, impact, how pilot action will be measured, what indicators will be used and result indicators.

    b) *Activities/result to be transferred and capitalized:* activities/results to be capitalized and transferred for the transnational LIVING LAB, pilot actions activities/results to be transferred in WP5, activities/results to be capitalized in WP6, links with WP2 (communication).

    c) *Pilot action planning:* resources needed and timing.

    d) *Open Data involvement:* in which way the pilot action will concern/regard/imply Open Data and which datasets the pilot action will need.

    e) *The initial assessment of the pilot action:* assessment in relation to answer to unmet needs, participatory process, territorial relationship, economic sustainability, sharing of the value created, skills development and Open Data.

Several techniques have been used to collect the information:

- Local use case scenarios reports (D3.6.2): The information collected and consolidated by each partner, as a result of scoping workshops developed during WP3 Studying, has been used as a basis to better understand the context of the pilot actions to be implemented.

- A pilot action poster template: The elaboration of a pilot action poster template made it possible to share during the 3rd transnational meeting held in Rome on the 15th and 16th of October, each pilot action with a presentation on it by each of responsible partners.

- Pilot action executive plans template: The elaboration of a fact sheet to provide a common template where each partner could be able to collect the information

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[1] Kitchenham, B., Brereton, O. P., Budgen, D., Turner, M., Bailey, J., & Linkman, S. (2009). Systematic literature reviews in software engineering–a systematic literature review. Information and software technology, 51(1), 7-15.

regarding their pilot action executive plans, which should follow common requirements.

- **Conducting:** each project partner of the pilot actions to be implemented was responsible for carrying out the collection of information in its region and writing the associated report.

- **Reporting:** finally, with all primary pilot action executive plans, a synthesis is obtained, and an analysis and conclusions is carried out. The result of this phase is this document.

4. Sources

The information contained in the document comes from the following sources:

- +RESILIENT Partners

    The information analysed and exposed in this document comes from the information collected by the projects partners. Trying to gather a homogeneous and coherent set of data, templates were defined and later used by every partner to collect the required information regarding pilot actions.
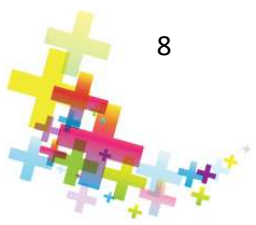
    - Athens region is not included since they were not intended to collect this information

It's important to highlight the fact that that for some pilots, detailed information on the pilot and aspects of indicators important for the assessment of the pilot action have not been provided. This is the case of Treviso and UCCIAL.

5. Pilot action executive plans

5.1. Areas /territories involved

Figure 1 shows in blue the project's regions where we have collected information regarding pilot actions to be implemented.
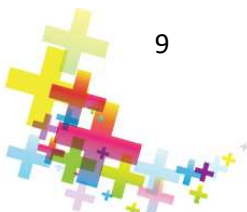
Figure 1. Project's regions where pilot action information has been collected

5.2. Macro scenarios involved

Every defined pilot action is framed by at least of the three project's identified macro-scenarios. These macro-scenarios are:

1) The delivery of innovative public services (social entrepreneurship development, e-health, vulnerable groups, long-term unemployed, migrants and refugees etc.),

2) Supporting to SMEs with social vocation and responsiveness: (businesses linked to smart specialization, ex: social farming, sustainable tourism, education etc.)

3) Capacity building of social enterprises, sharing economy, third sector, citizens' organizations, crowdfunding initiatives etc.

The following table shows an overview of the pilot actions that each project partner will implement, the macro scenarios in which these pilot actions are adjusted, as well as the region and country in which they will be tested:

Partner	Pilot action name	Scenario 1: The delivery of public innovative services	Scenario 2: Supporting to SMEs with social vocation and responsiveness	Scenario 3: Capacity building of social enterprises	Country – region
AMU	Food desert Operation	X		X	• Provence-Alpes-Côte d'Azur (NUT 2) • FRANCE
ANCI	Social Innovation and Generativity in the Mediterranean City	X	X	X	• Italy • ITALY
Barcelona Activa	Care sector upskilling and training			X	• Barcelona (NUT 3) • SPAIN
Chamber of Commerce Treviso-Belluno	Development of a model for the job placement of disadvantage people in mountain areas	X			• Belluno province (NUT 3) • ITALY
FOUNDATION - ISTRA REGION	ReCeD'Istria – Regional centre for social innovation Istria	X			• Istria Region (NUT 2) • CROATIA
FOUNDATION - ISTRA REGION	Innovations for Sustainable regional Development	X			• Istria Region (NUT 2) • CROATIA
ITANNOVA	Providing a list of companies /entities belonging to third sector and the products/services they provide		X		• Aragon (NUT 2) • SPAIN
PRIZMA	Social Innovation Accelerator		X	X	• Podravje Region (NUT 2) • SLOVENIA
RDCI	CARE4ALL	X			• Alentejo (NUT 2) • PORTUGAL
REMTH	Developing a training			X	• Region East Macedonia

Project partners

Lead Partner

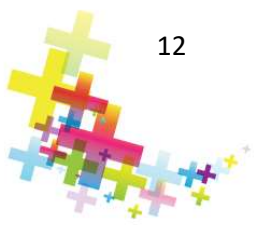|					
	programme on Social Entrepreneurship				and Thrace (NUT 2) GREECE
UCCIAL	Child Friendly City (CFC) in Kamza Municipality	X		X	Tirana (NUT 3) ALBANIA
Veneto Region	SVR Community of Practice to overcome labour mismatch	X			Veneto Region (NUT 2) ITALY

5.3. Descriptions

The following table details the main objectives of each of the pilot actions to be implemented:

Partner	Pilot action name	Aim of the pilot action
AMU	Food desert Operation	To develop a specific project aimed at reducing the food gap between rich and poor citizens, between well-off and deprived neighborhoods, between city centre and the periphery.
ANCI	Social Innovation and Generativity in the Mediterranean City	The pilot action is aimed at analyzing and supporting a case of Generativity in a Mediterranean city, in collaboration with the project *Valore Comune* carried out by IFEL. The chosen case is that of Brindisi. The pilot action will analyse and support the re-use of an historical palace (Palazzo Guerrieri) providing expertise for the production of data and information supporting the analysis of the socio-economic context within which the palazzo is placed, supporting the design of policy actions, and monitoring the activities and results of the project.
Barcelona Activa	Care sector upskilling and training	New job profiles and skills will be designed and prototypes will be made about the new trends on skills and profiles from the care services (addressed to elder and dependent people). With the outcomes from the design and prototype of new and polyvalent skills and professional profiles, adapted and innovative training plans will be designed. New models of provision of care will be analyzed and prototypes will be built adapted to the new needs of elder and dependent people and caregivers according to the place where they receive the care services: at home, in residential centers or in day centers.
Chamber of Commerce Treviso-Belluno	Development of a model for the job placement of disadvantage people in mountain areas	The pilot action to be implemented by the Chamber of Commerce aims to adapt and further develop at a local level the social innovation practices which will be worked out by Veneto Region. The pilot will adapt regional action into one rural/mountain area, rich of small community with a past experience of strong social relationships, that are under changing due to demographic, social and climate changes. The Pilot aims at setting up a local Community of strategic actors operating in strict collaboration with the regional network; the Community shall be set up in order to adapt and implement the actions to particular local needs given by the morphology of the mountain territory, the reduced attractiveness towards young people, the small sizes of the companies, the impact of the climate changes, etc.

FOUNDATION - ISTRA REGION	ReCeD'Istria – Regional centre for social innovation Istria	Increasing of public awareness about social innovations and their importance for the society development what will lead to preparing a good startup of the new Regional centre for social innovation Istria, named "ReCeD'Istria".
FOUNDATION - ISTRA REGION	Innovations for Sustainable regional Development	Boosting research potential of youngsters through development of innovative research and development initiatives related to urban topics such as social entrepreneurship development, e-health, public transport, sustainable usage of urban infrastructure, innovative models of education, environment protection, etc.
ITANNOVA	Providing a list of companies /entities belonging to third sector and the products/services they provide	To provide all the potentially interested people with a list of social economy entities and their activities. One of the benefits is making easier the fulfilment of some criteria set in public contracts. Sometimes by law and sometimes by trend, these contracts involve social clauses and reserving a percentage to social entities.
PRIZMA	Social Innovation Accelerator	Through first three stages of the process of social innovation (prompts, proposals, prototypes), we will test the program of Social Innovation Laboratory, connect people, ideas and resources and elaborate ways of further support needed to boost social innovations and social economy sector growth.
RDCI	CARE4ALL	Development of an interactive digital tool, mapping existing social responses in Central Alentejo, for searching and contacting social care providers. The tool should cover all types of social care services delivered by public and private organizations, in the region. The digital tool will be developed as a prototype for an Internet Portal (and App for mobile devices).
REMTH	Developing a training programme on Social Entrepreneurship	The overall aim of the pilot action is to provide a tool aiding social enterprises and people involved in obtaining, improving and retaining the skills, knowledge and other resources (e.g. skilled human capital) needed to do their jobs competently, while allowing individuals and organizations to perform at a greater capacity (larger scale, larger audience, larger impact etc.). In other words, the aim of the pilot action is to increase skills and knowledge needed by social entrepreneurs to «do the job done» and «perform better».
UCCIAL	Child Friendly City (CFC) in Kamza Municipality	A child-friendly city is a city or community where children (one of these objectives) meet friends and have places to play and enjoy themselves.
Veneto Region	SVR Community of Practice to overcome labour mismatch	The overall objective of the pilot action is to identify a new way to produce and implement social innovation practices at regional level, coherent with the context and framework of existing policies, but innovative, co-created and based on open data (OD). This objective will be pursued through the establishment of an innovative Community of Practice of strategic actors (quadruple helix) for the territory, who play a role of "generators" of innovative ideas / services on the specific theme of skill mismatch, in a cooperative perspective and with shared responsibilities.

Project partners

Lead Partner

5.4. Type of action

The type of action of most of the pilot actions is oriented to the definition of innovative models, methods, services and tools for increasing social responsiveness, awareness raising and network building or communication. Also to contribute to transnational pilot action.
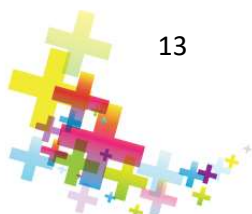
In order to make an initial analysis, identify the needs and try to solve the precise problems, participatory methods such as the development of workshops and meetings with the actors involved (municipality staff, local businesses, disadvantage people, etc.) are proposed. In some cases, the definition and implementation of an innovation model of participation and collaboration is proposed to improve entrepreneurial and policy interest, with the general interest of the community.

The proposed pilot actions deal with different problems (see the following image):

Figure 2. Type of action of pilot actions

- Food gap between rich and poor citizens, between well-off and deprived neighbourhoods, between city centre and the periphery (AMU)

- Urban regeneration: re-use of an historical palace (ANCI)
- New job profiles, skills and training programmes from the care services addressed to elder and dependent people (BA)
- Make a list of social economy entities and their activities accessible to potentially interested persons (ITAINNOVA)
- Awareness about social innovations to prepare a good start-up (ISTRIA)
- Initiatives in urban areas with special attention to youngsters (ISTRIA)
- Identification, diagnosing and ranking of social/community issues to establish way of further support needed to boost social innovations and social economy sector growth (PRIZMA)
- Mapping existing social responses, form searching and contacting social care providers (RCDI)
- Aiding social enterprises and people involved in obtaining, improving and retaining the skills, knowledge and other resources needed to do their jobs competently (REMTH)
- Adapt and further develop at a local level the social innovation practices which will be worked out by Veneto Region (CCIAA)
- Identify a new way to produce and implement social innovation practices at regional level (VENETO)
- Creating child friendly environment of public spaces (UCCIAL)

The pilot actions to be implemented in both the Aragon (Spain) and Alentejo (Portugal) regions are aimed at achieving a digital tool. In general, these developments require a phase of management, analysis, design, development, validation, deployment and dissemination of the tools.
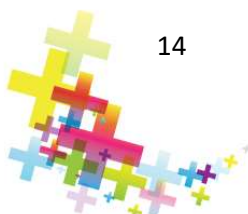
5.5. Outcome

Obviously, the outcomes expected from each pilot action are aligned with the type of action described above.

In the case of food gap, the major outcome is to improve access to healthy, quality and sustainable food through the progressive change of food habits and increase in the food supply in the concerned neighbourhoods.

In the case of urban regeneration, the major outcome is to get data and information on the potential of social innovation for social and economic development, to improve support in designing and implementing policies for urban regeneration.

In the case of job profiles, skills and training programmes from the care services addressed to elder and dependent people there are several outcomes: improve professional development and acknowledge, offer more accurate services… In this same context of obtaining, improving and retaining skills, knowledge and other resources needed to do the job competently, other outcomes are decrease the problem of the poor knowledge of the social economy law and social

entrepreneurship and the establishment of mechanism with core mission the support and capacity building of the involved parts in the social economy sector. This last outcome is shared by several pilot actions. Stakeholder participation is seen as important aspect in addressing the problems to be tackled.

In the case of raising awareness of social economy enterprises and the services they provide, the major outcomes is to facilitate access to this information for both entities and the general public. Information required in some criteria or social clauses in public contracts.

In the case of adapt, produce and implement social innovation practices at local and regional level, the main outcomes are the establishment of a new network of territorial stakeholders, the establishment of a permanent mutual learning process, the enhancement of network culture and active participation, the production of ideas/services with innovative content by territorial stakeholders, the recognition/forecasting of new territorial trends/needs/priorities regarding the labour mismatch, etc.

5.6. General description of tasks and activities

All partners involved in the implementation of pilot actions have made a general description of the tasks and activities to be carried out.

On the whole, all the pilot actions to be implemented contemplate tasks and activities related to:

- Analysis of the context, needs or problem to be solved
- Implementation of the solution to the problem
- Testing, evaluation and feedback pf the results obtained
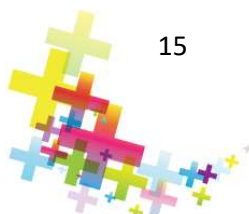- Communication / training / dissemination

Additionally, some pilot actions specify in more detail the publication of data in open format, the establishment of working groups, etc.

5.7. Stakeholders and players to involve

In more than two thirds of the pilot actions to be implemented, the involvement of actors belonging to the following types of groups has been explicitly specified:

- R&D / Academic centres
- NGOs /Social economy organizations / Civil society
- Companies
- Public Administration

This means that most of the pilot actions involve participants from the 4 - helix. The quadruple helix model provides a new approach for tackling the complex challenges we face in our societies. It breaks down the traditional silos between government, industry, academia, and civil

participants, bringing these multidisciplinary viewpoints together in an environment that promotes team working, collaboration and the sharing of ideas. By working together, this quadruple helix approach can create new shared value that benefits all participants in what becomes an innovation ecosystem. Technology plays a key role in creating networks and connectivity. Value is characterised by a long-term view, focusing on improved social conditions as well as company performance. And success is measured for the ecosystem as a whole, rather than individual units.

Figure 3. 4-helix participants

According to the chart, only three countries have not clearly specified the involvement of stakeholders and actors belonging to the 4-helix.

In one pilot action of Istria, *"Innovations for Sustainable Regional Development"*, the participants are more related to the world of academia (youngster involved in trainings, students, mentors, and university and research institutes) and NGOs dealing with innovative approach to research and development in STEM field. However, it is not specified the participation of private companies and public administration.

In the pilot actions of CCIAA Treviso-Belluno and UCCIAL, the only group missing or not specified is the academia.
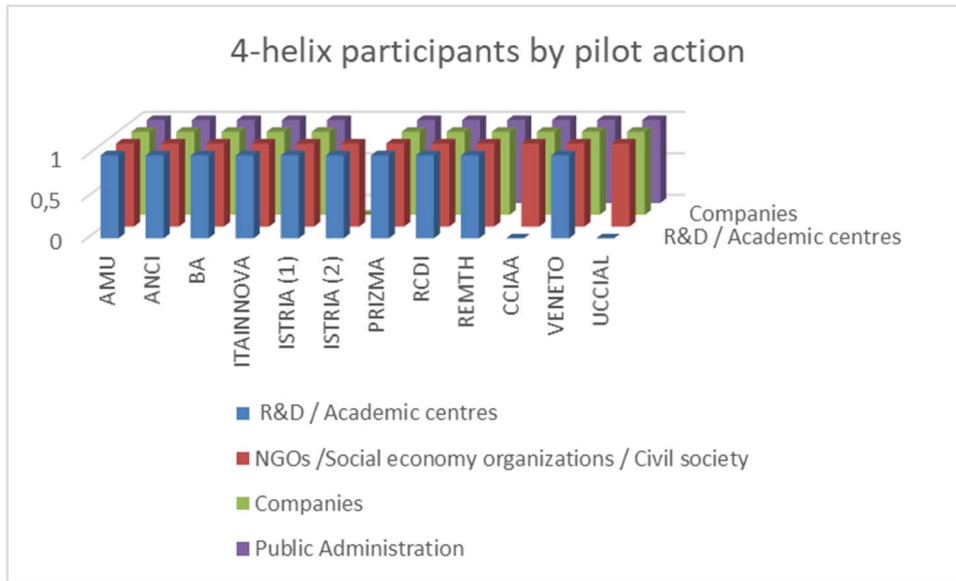
Figure 4. 4-helix participants by pilot action

5.8. Target groups

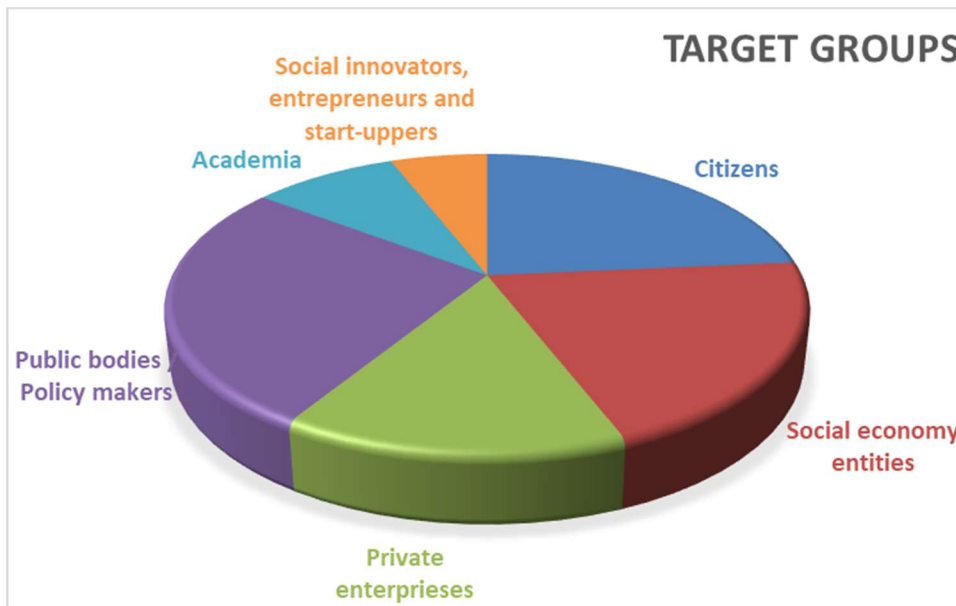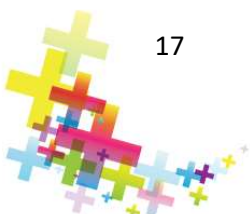As expected, the main target groups of pilot actions to be implemented fall into the following groups:

Figure 5. The main target groups of pilot actions

The target group of citizens or general public includes elderly people, dependent people and families, families with children, senior citizens, people with special needs/disable people, unemployed people (in particular people with different forms of disabilities, unemployed people over 50, long-term unemployed, migrants, young NEETs, etc.),… Depending on the pilot action it is more oriented to one type of citizen or another.

More than half of the pilot actions consider social economy entities and/or private enterprises as a target group.

In most of the pilot actions, public bodies and policy makers appear as an indirect target group. Within this group there are representatives of municipalities and managers and workers of public administration. In general, local, regional and national governments willing to enact policies for generativity and social innovation, and improve social rights are involved.

In one third of the pilot actions, the academy also stands out as a target group. This group includes universities and knowledge institutions, high schools/training centres, student's programmes, higher education and research institutions.

In addition, in two pilot actions (Italy and Region East Macedonia and Thrace) include social innovators, entrepreneurs, start-uppers and individuals who have intend to create new social enterprises.

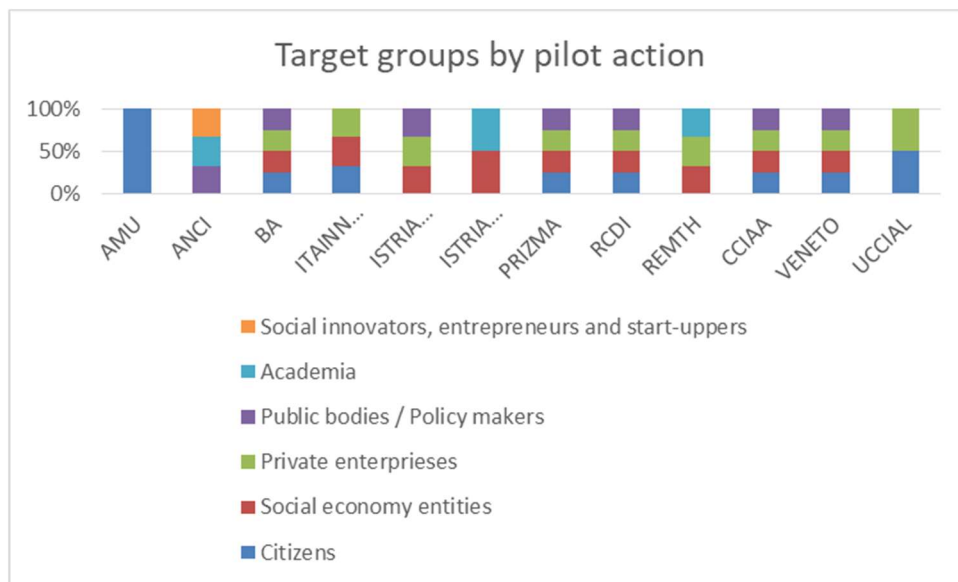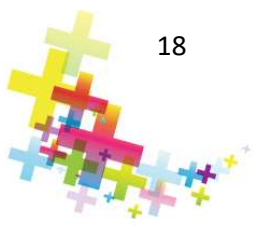The next graph shows for each pilot the target groups involved:

Figure 6. Target groups by pilot actions

5.9.   Responsibilities and roles

In relation to the information of responsibilities and roles specified in the different pilot use cases to be implemented, these are distributed among the following main and common groups:

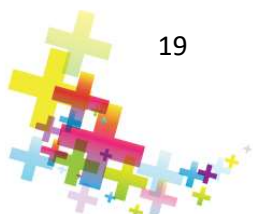**Figure 7. Main responsibilities and roles groups identified**

The objectives of the management/coordination/monitoring role are to effectively coordinate, manage, plan and conduct the pilot action. This ensures efficient management of the pilot action and a consistent and high quality of the work to be carried out. It includes the activities to ensure that the implementation of the pilot action is carried out in the pre-established time and with the planned resources and to ensure the quality of the work.

The purposes of the participation leadership role are to coordinate the participation of the stakeholders and players involved in pilot actions through focus groups, workshops, meetings, etc. required to implement them.

The aim of the role of the implementer is to carry out the pilot action (develop a model, develop a digital tool, etc.)

The role of expert represents those people with experience to develop the research focus of the pilot action to be implemented.

Only in one pilot action, this information has not been explicitly specified in detail.

5.10. Results

Partners have mistaken in some cases results and impacts, so it has been difficult to obtain common points between them. In addition, results are very aligned with the pilot projects themselves, so extracting a common pattern is not always possible.

Nevertheless, and taking only the main results stated by the partners, it may be seen that pilot projects' results are classified as follows:
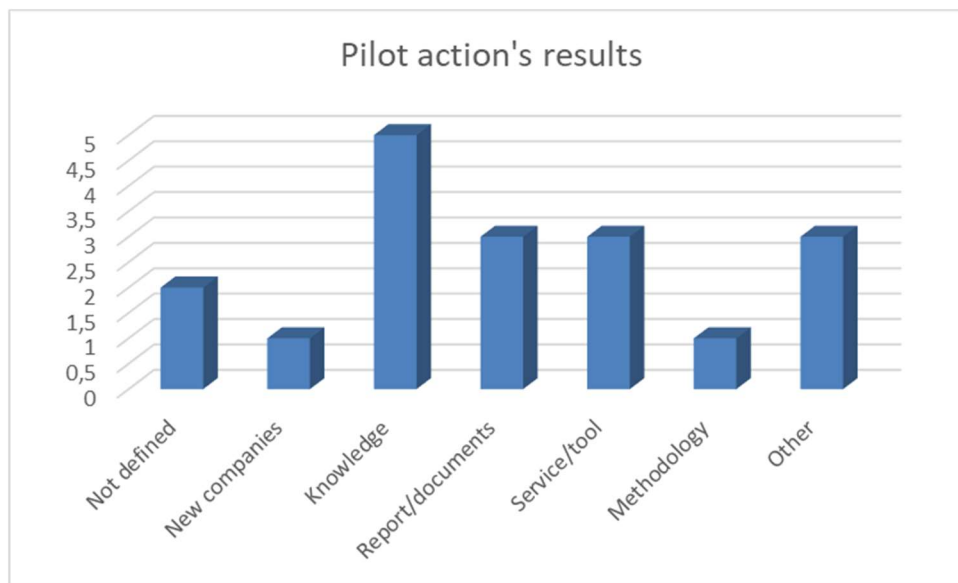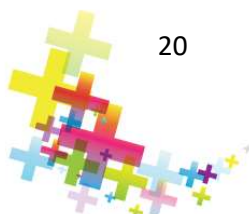

Figure 8. Process and results indicators

5.11. Impact & impact's measurement

Even though the pilot projects' expected impact depend on the nature and implementation of said pilot projects, there are some common points mentioned by more than one partner, which are worth highlighting:

- The impact on regional policies is mentioned by half of the partners.
- One third mentions the raise of awareness and the visibility of the sector (or elements related to the sector) as an important impact.
- Ten out of twelve mention the improvement of one or another topic (i.e. labour market, labour skills, social care services, communication...)

In summary, the pilot projects are intended to have a positive impact on the local communities, increasing some indicators (both tangible and intangible) and affecting the policies through the policy makers.

As for the impact measurement, most partners (seven out of twelve) name surveys and questionnaires as means of collecting information. Some of them define some specific indicator, but most of them leave it unspecified or have it included in the next section, focused on indicators.

5.12. Indicators

Note: No data about this section has been received from UCCIAL, so the comments and analysis below don't include this partner.

Most partners (10 out of 11) have differentiated between process indicators and result indicators. It's difficult to extract common points since many indicators are very open or are closely related to the pilot projects' implementation. Anyway, it's easy to detect some trends, especially concerning the process indicators, where 4 out of 11 partners have chosen to follow the evaluation indicators suggested by AMU. Besides, two more partners have decided to group the indicators following the areas defined by AMU's indicators.

In addition to the differences in the indicators themselves, the main differences are focused on the number of aspects to be assessed and on the detail given about each of them. This difference may be easily seen in the following table:
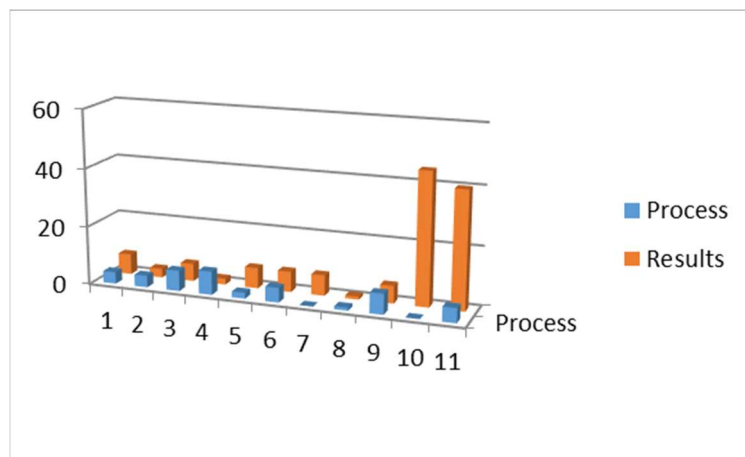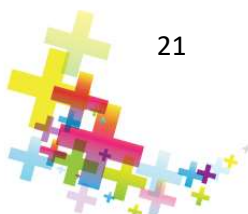

Figure 9. Process and results indicators

5.13. Activities/results to be transferred & capitalized in the Living Lab

Note: No data about this section has been received from UCCIAL, so the comments and analysis below don't include this partner.

Most partners have identified their pilot projects (or at least part of their pilot projects) as the main result to be transferred and capitalized during the Living Lab. Some of them have

emphasized some aspects, such as the training material, or the process itself, but in general it's clear that the pilot projects' activities and results are the core of this Living Lab. It's important to add the suggestion of one partner, which has added the pilot project's results' advantages and assessment as a point to be transferred.

In some few cases, other important aspects have been also named, such as the participatory approach and the participation of stakeholders and the pilot projects' teams in the living lab. Since it might be considered a good practice, this approach may also be adopted by every partner.

5.14. Activities/results to be transferred (WP5) and capitalized (WP6)

Note: No data about this section has been received from UCCIAL, so the comments and analysis below don't include this partner.

WP5 and WP6 are closely related, almost dependent, and this dependency is reflected in the answers given by the partners when asked about the activities for each of these two work packages. In fact, there are some cases where the answers have been mixed.

Due to these facts, this section covers both the activities to be transferred and to be capitalized.

The activities named by the partners are as different as the planned pilot projects, but there are some points which have arisen more than once, and therefore they might be important to remark.

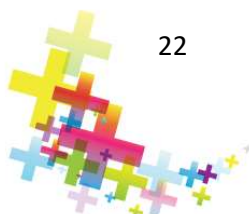In fact two concepts are easily distinguished in both the capitalization and the transfer phases:

- The strong link with pilot project themselves
- The involvement –in one or another way- of stakeholders

The link to pilot projects is mentioned throughout different implementations: transferring lessons learnt, spreading and capitalizing the used methodology, sharing the results and the outputs/outcomes, reusing the collected & generated information/knowledge via training and courses…

The involvement of stakeholders is also mentioned by several partners; even more if we consider policy makers and public authorities as such. In some cases the involvement includes no detail, but in some cases it's stated the necessity of addressing them as a key point for the transfer/capitalization or the aim to make them adopt the whole set of policy making processes.

As expected, some specific ways to transfer the knowledge have been enumerated, such as workshops, events, webinars, leaflets, training material and so forth.

Regarding the potential recipients of the transfer, most partners include only the stakeholders, public authorities and policy makers (which usually are the same or very related). Few partners

have named other potential recipients: the university, public at large, some specific departments in regional government, the SRCVs...

Finally, it's important to highlight some possibilities for capitalization given by some partners, which may be also be applied to other pilot projects:

- Taking profit of synergies with different initiatives
- Other regions, sectors and other data
- Other countries and languages
- Actions to ensure sustainability of the training material in the platform

5.15. Links to WP2

All the partners state the link between the pilot actions and the communication activities, emphasizing some of them and, in most cases, leaving it open to new activities of this type.

There are some common activities included by more than one partner. In the following graph, it's displayed some of this common activities and the number of partners that have named them:

Figure 10. Communication activities

In addition, it's remarkable that half of the partners include the project mini site as a communication mean, and two partners highlight the importance of involving stakeholders in the communication activities.

Some partners have left open the possibility to include new communication means. It might be a good idea to exchange information between the partners on possible means of communication in order to get new ideas.

5.16. Resources needed

The required resources depend on the pilot project, but there are common points and some trends that are worth highlighting:

- Most partners have not estimated a budget for the pilot project (only 4 out of 12 have done it). The estimated range for the ones that have, goes between 24,000 and 40,000€.
- Most partners declare to need external expertise and hired staff to perform the pilot projects' activities. Only two are doing it with internal staff.
- In some cases, the involvement of stakeholders is expected/required, and some budget is allocated for travels.
- Some events are also planned and their costs are included for several pilot projects.
- Only two partners declare to have some subcontracting planned.

5.17. Open data involvement and required data sets

Note: there is not information from UCCIAL regarding this section, so the analysis and comments below refer only to the rest of the consortium.

Every partner states that their pilot project involves open data technology in one or another way. It might be true even though the level of involvement differs enormously from one to another. There are a couple of them that declare to be completely focused on open data (it's important to high light the level of clarity and detail provided by RCDI, one of these cases); there are also some cases where the detailed necessities are expected to be defined in a further case. The rest of cases are in between.

There are three main types of pilot project if we focus on the usage of open data:

- The ones that use some public data (open data) – blue
- The ones that take data from different sources and display as open data – orange
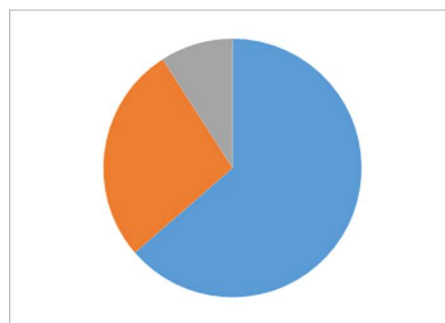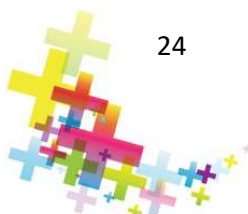- The ones that are focused on open data but don't use nor provide it – grey

Figure 11. Use of Open Data

The figure shows how most of the pilot projects intend to use the data for the implementation.

Regarding the required data, 9 out of 11 partners have clearly identified the data they need (even though in some cases the identification is only partial and more work must be done to identify all of them).

As for the sources, eight partners have stated some potential source of data, even though they are web pages. Nevertheless, it must be also highlighted that half of the partners declare that they need to find more data and, therefore, more data sets must be created for the project.

6. Result indicators

6.1. Evaluation of joint pilot actions

The evaluation, based on social experimentation principles will provide evidence of the expected positive impact and will contribute to create a more robust storytelling capable to create buy-in in the transfer and capitalization activities.

Throughout the pilot phase, the evaluation process (obtain indicators) will be carried out at various times in order to identify whether the stakeholders really participate or not, if there are resources, they must be generated and they are accessible, if there are obstacles to implementation of the pilots, etc.

As starting point, every partner has been asked to evaluate their pilot action regarding seven aspects:

Answer to unmet needs
Participatory process
Territorial relationship
Economic sustainibility
Sharing of the value created
Skills development
Open data

Hereby it's displayed the graphical view of every partner's evaluation as well as a whole graphic showing the comparison between all of them. In this way, it's easy to distinguish the strengths and weaknesses of each region regarding the evaluated aspects.
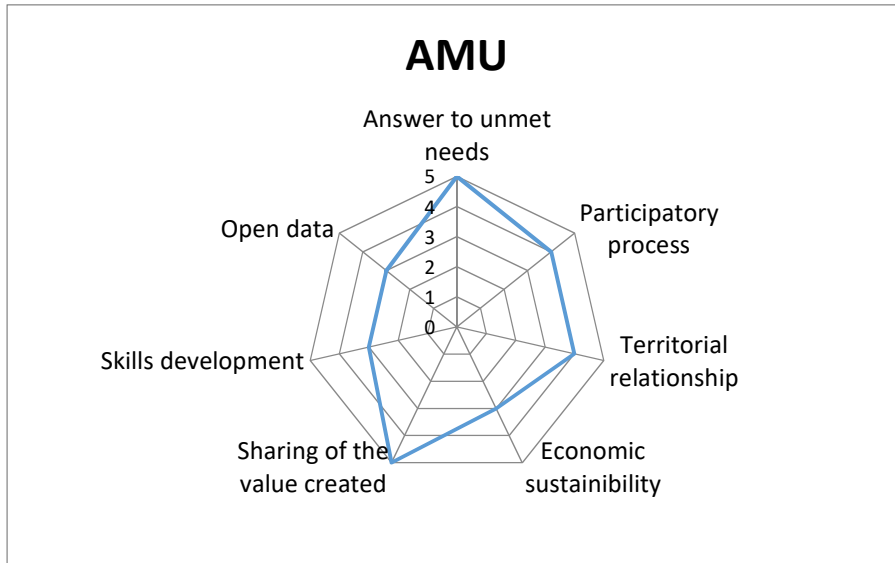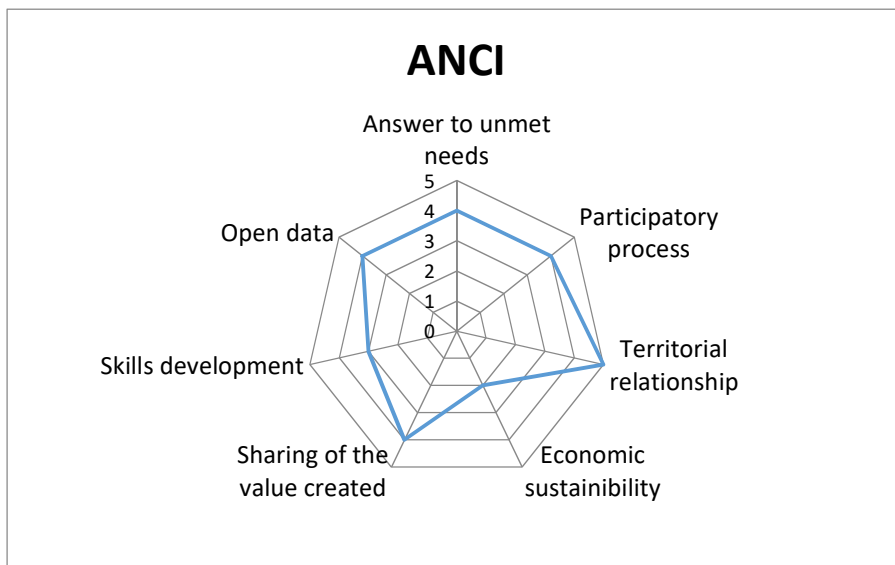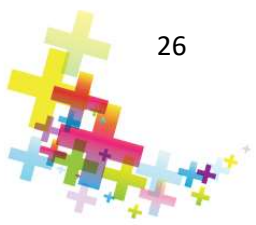
Figure 12. Initial assessment of AMU's pilot action

Figure 13. Initial assessment of ANCI's pilot action

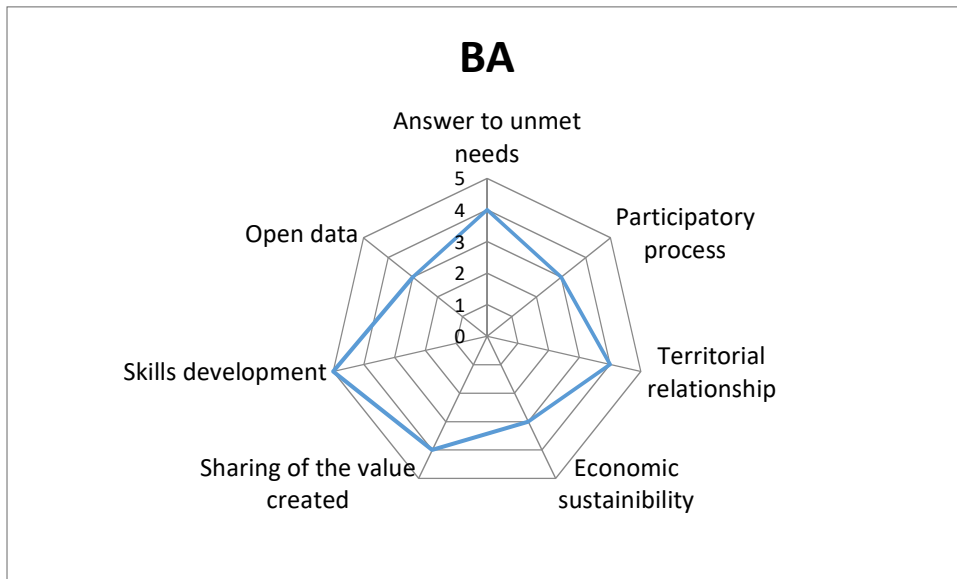**Figure 14. Initial assessment of BA's pilot action**

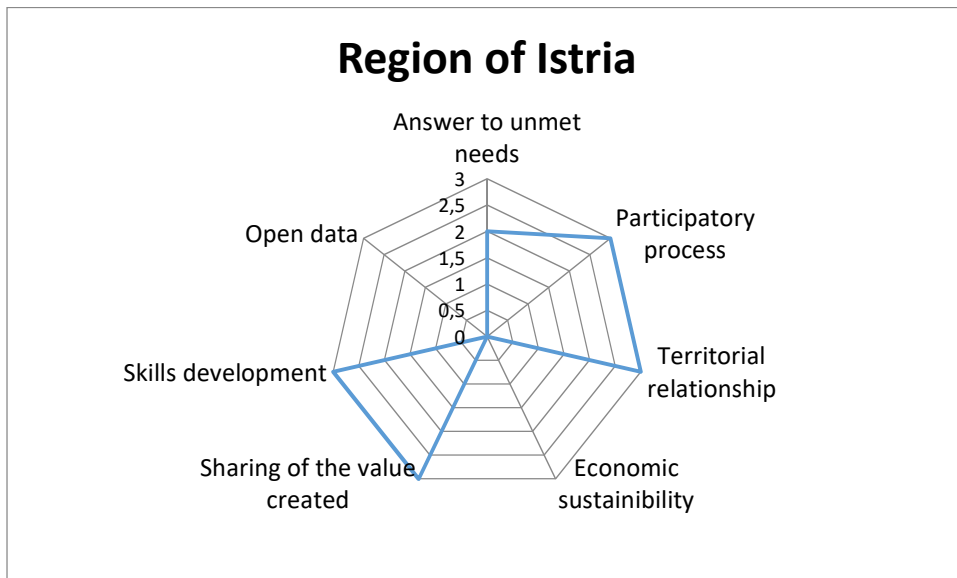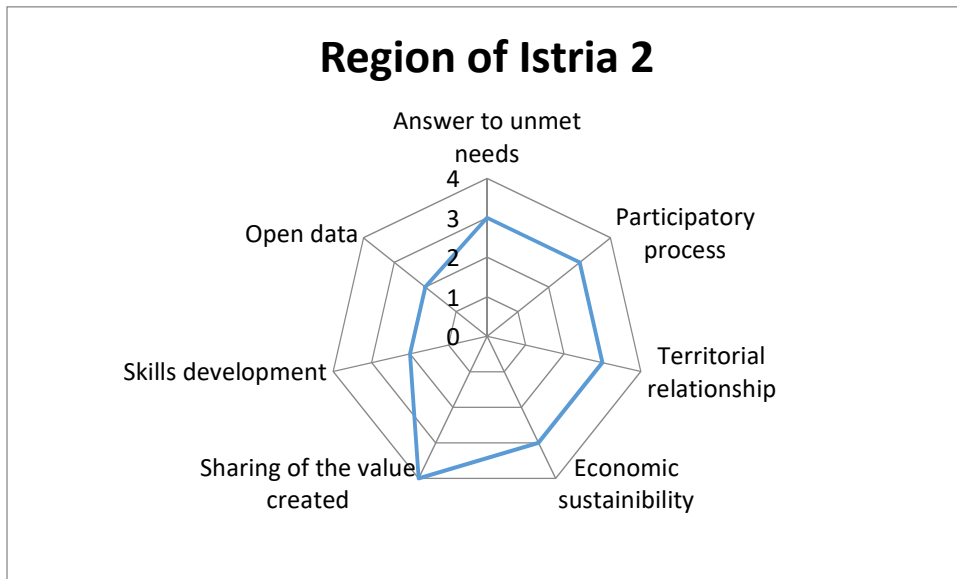**Figure 15. Initial assessment of Region of Istria's first pilot action**

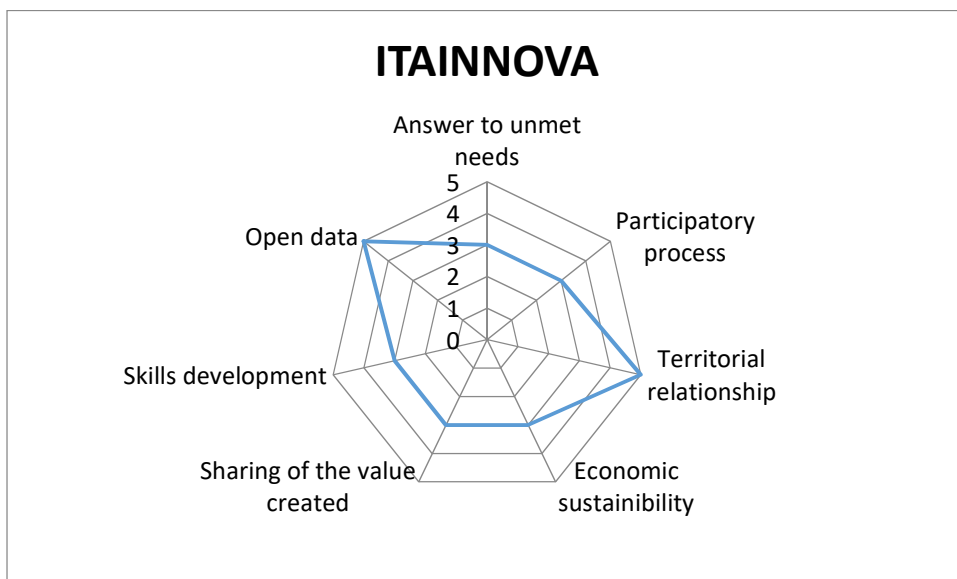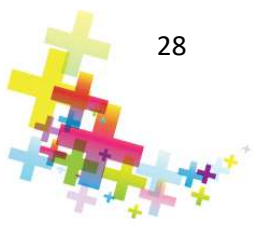**Figure 16. Initial assessment of Region of Istria's second pilot action**

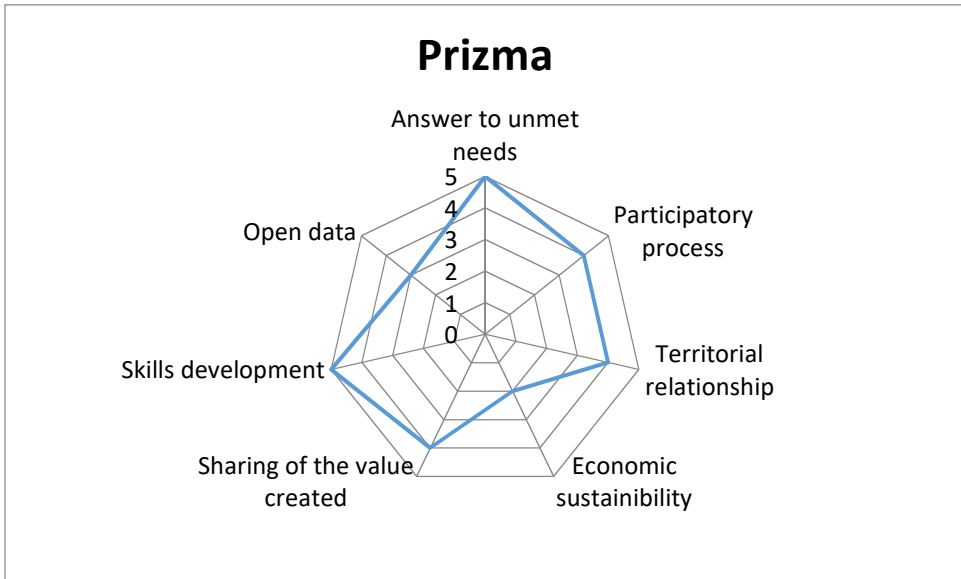**Figure 17. Initial assessment of ITAINNOVA's pilot action**
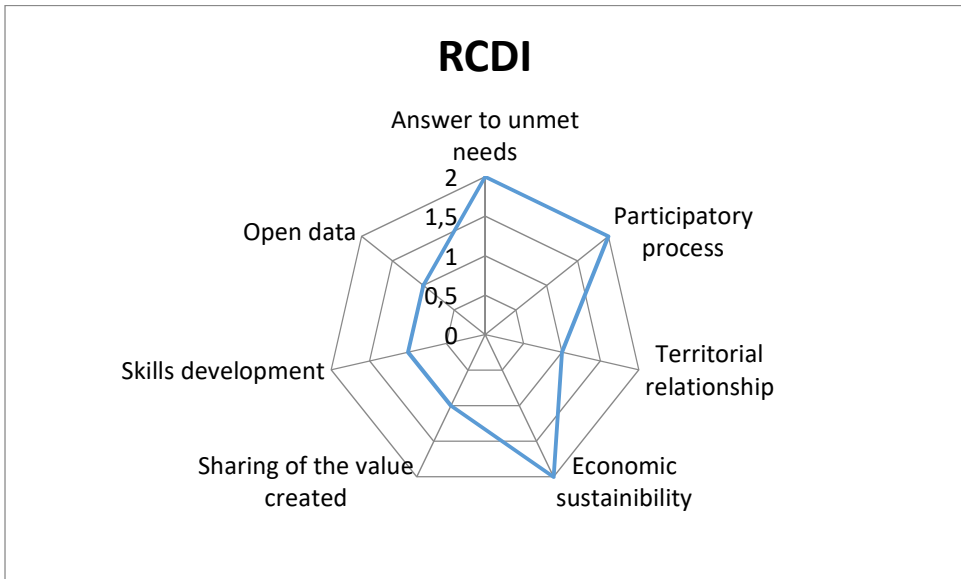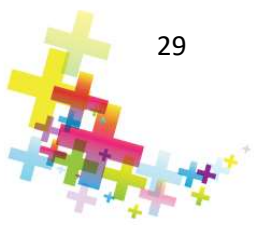
Figure 18. Initial assessment of PRIZMA's pilot action

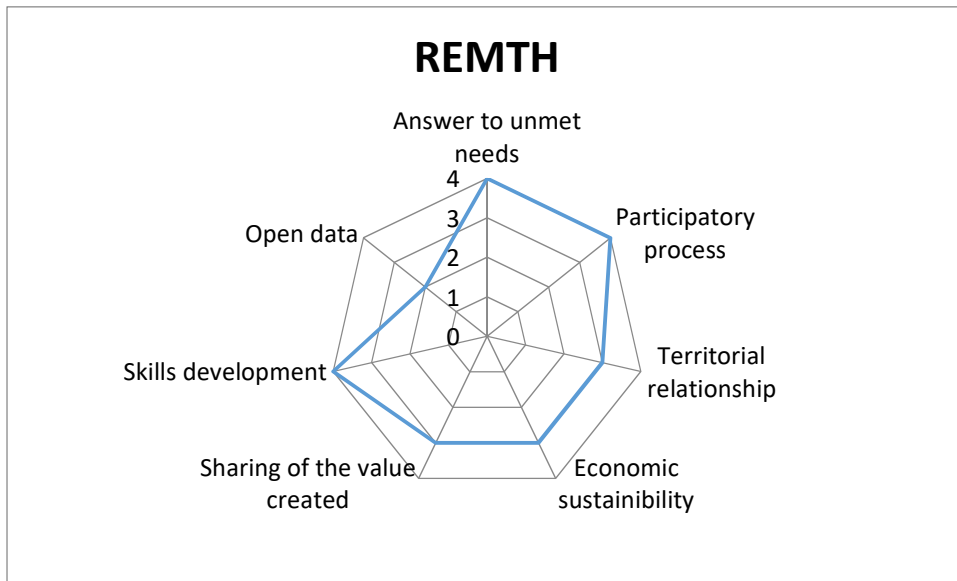**Figure 19. Initial assessment of RCDI's pilot action**

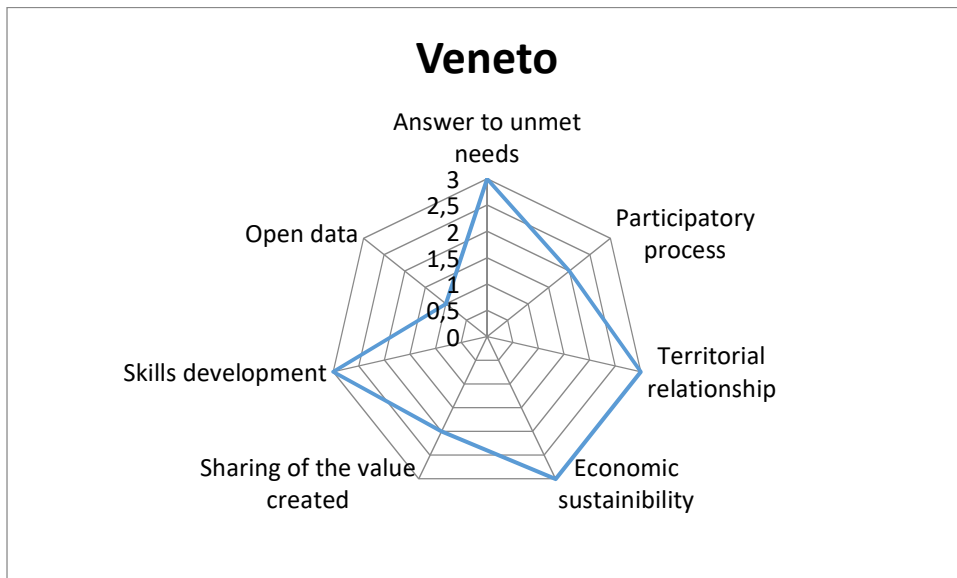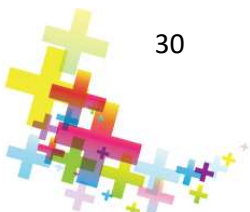**Figure 20. Initial assessment of REMTH's pilot action**

Figure 21. Initial assessment of Veneto's pilot action

Treviso and UCCIAL have not provided any data regarding the evaluation so they are not included in the analysis. The following graph displays a comparison of the situations for all partners:
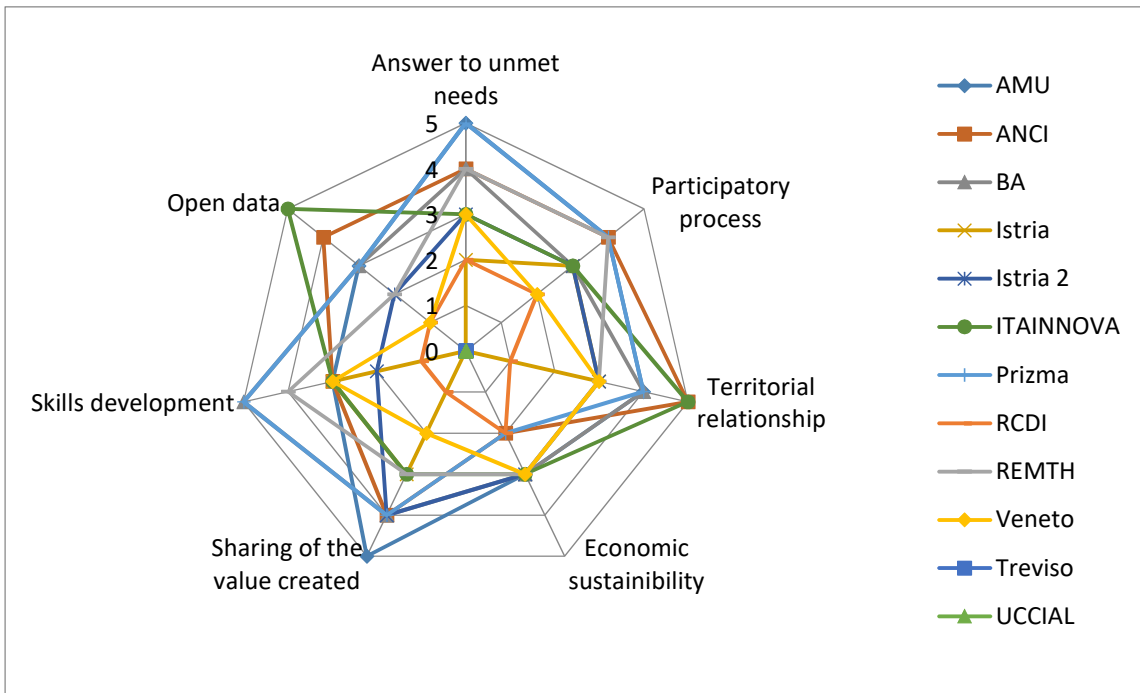
Figure 22. Comparison of assessments of pilot actions

It's also interesting to see the assessment given by every partner, since some of them have used significant lower figures (it's a subjective process, so this is not unexpected).
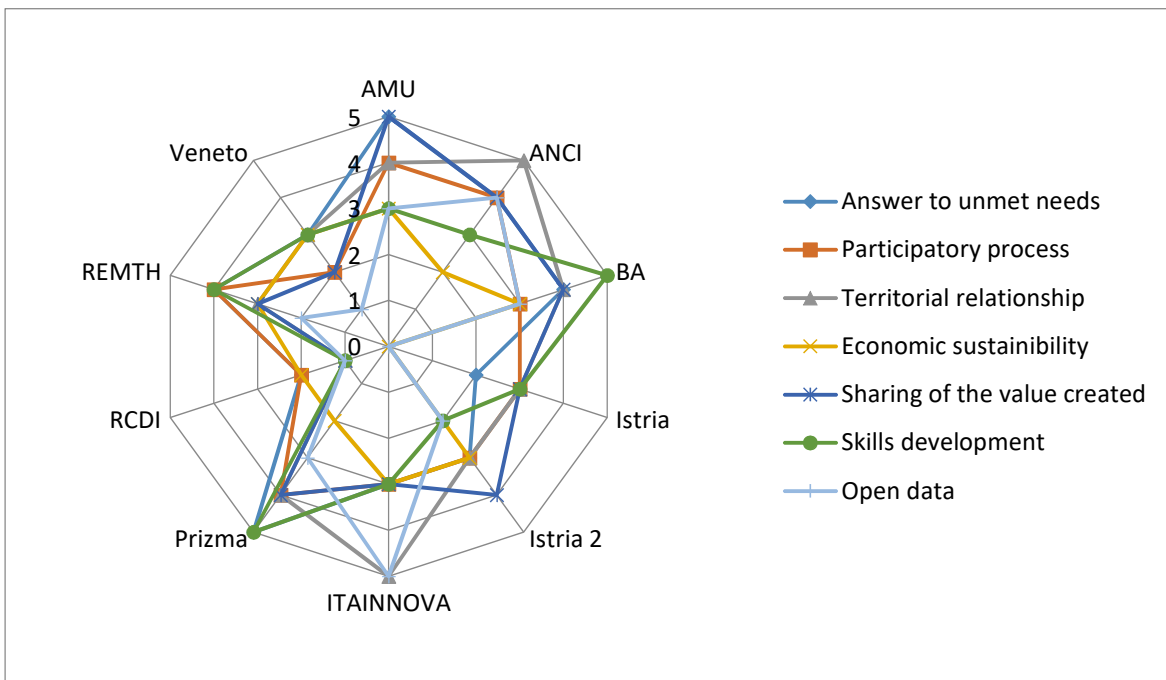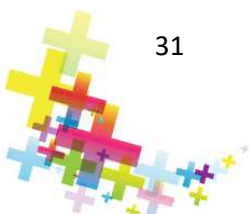

Figure 23. Another perspective of comparative evaluation of pilot actions

7.   Planning

Half pilot actions are expected to be finished by mid 2020, at least regarding the implementation phase (Veneto and Treviso have planned a test phase that is supposed to last 6 months). Some of them have even started before 2020, as it may be seen in the following table:

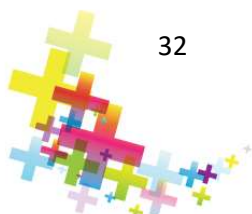|	2019		2020											
	11	12	1	2	3	4	5	6	7	8	9	10	11	12
AMU			■	■	■	■	■	■						
ANCI				■	■	■	■	■	■	■	■			
BA			■	■	■	■	■	■	■					
Istria	■	■	■	■	■	■	■	■	■	■	■	■		
Istria 2					■	■	■	■	■	■				
ITAINNOVA			■	■	■	■	■	■						
Prizma			■	■	■	■	■	■	■	■	■			
RCDI			■	■	■	■	■	■						
REMTH			■	■	■	■	■	■						
Veneto		■	■	■	■	■	■	■	■	■	■	■	■	■
Treviso			■	■	■	■	■	■	■	■	■	■	■	■
UCCIAL(*)														

Figure 24. Pilot action's planning

(*) No data has been provided for the schedule of UCCIAL's pilot action.

8.   Conclusions

Finally, this section highlights the main conclusions of the analysis of the pilot actions to be implemented:

Most cases address the 4-helix clusters, but it might be advisable to include the academia when it's not included. In this line, the involvement of stakeholders in the pilot projects is desirable and a good practice that helps the project visibility.

There is a great apparent disparity between pilot projects, but all of them are intended to have a positive impact on the local communities, increasing some indicators (both tangible and intangible) and affecting the policies through the policy makers.
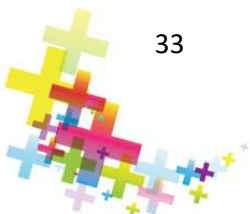
Project partners

Lead Partner

As a good practice, all project partners could take profit of the other partners' ideas in order to improve the implementation of the pilot project in topics such as communication and involvement.

9. Annexes

A description of every partner's pilot project is attached.