

AEBR – AGEG – ARFE



METHODOLOGY FOR ACTION PLANNING

within the project Inter Ventures

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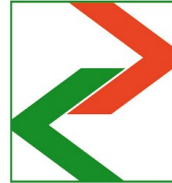
on behalf of

the Association of European Border Regions (AEBR)



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INTRODUCTION

During the first phase of the Inter Ventures project, the Project Partners have participated in online meetings, webinars, and have collected and analysed Good Practices. Now it is the time to put all the collected knowledge on paper and create an Action Plan to describe what will be done in the Partner Region to ensure that the lessons learnt from the cooperation are put into action.

An Action Plan is a detailed plan outlining actions needed to reach the required Policy Change. The aim of this Methodology is to guide the Project Partners in creating a structured Action Plan that will provide motivation as well as certainty that by following the planned steps, the Policy Change will be reached, and will be reached without any wasted time and effort.

This Methodology is the fourth, and final, step in the project Inter Ventures which aims at **promoting the internationalization of SMEs in the EU border regions, thus contributing to their growth and increased competitiveness and enhancing the development of the EU border regions**. Having a structured Action Plan for targeting the Policy Instrument related to SME internationalization is a final but most important step in contributing to the SME internationalization in the EU border regions.

This Methodology for Action Planning has been designed by the Association of the European Border Regions (AEBR) to support the project Inter Ventures' approach on internationalization of SMEs in the EU border areas. The main aim of developing this Methodology is to provide the Project Partners with a tool on how to effectively and efficiently reach the changes in their targeted Policy Instrument.

Conduction of this exercise is supervised by the AEBR through the following activities:

- Introducing the Methodology for Action Planning via a Webinar to the Project Partners;
- Providing assistance to the Regional Stakeholder Groups through Action Planning process;
- Monitoring of Action Planning process;
- Review and check of the Action Plans prepared by the Project Partners.

1. CONCEPTS

ACTION PLAN

Action Plan is a document that provides details on how the lessons learnt from the cooperation will be implemented in order to improve the policy instrument addressed within the region. The Action Plan specifies the nature of the actions to be implemented, their timeframe, the stakeholders involved, the costs and funding sources as well as the way the action derives from the project. (INTERERG Manual (section 4.1))

GOOD PRACTICE

A Good Practice is “an initiative undertaken in one of the programme’s priority axes which has proved to be successful in a region and which is of potential interest to other regions”¹. Furthermore, a Good Practice is something that has already provided tangible and measurable results in achieving a specific objective as well as Good Practices will be the source of inspiration when preparing the action plans and improving the performance of the targeted policy instruments.

SME GOVERNANCE MODEL

SME governance model is a framework to help SMEs achieve long-term success. In case of SMEs the governance model is mainly about improving business efficiency and performance.

SME

Small and medium-sized enterprises (SMEs) are non-subsidary, independent firms which employ fewer than a given number of employees. This number varies across countries. The most frequent upper limit designating an SME in the EU is 250 employees. Financial assets are also used to define SMEs². Based on this definition, the turnover of a SME should not exceed EUR 50 million.

SMEs can be divided into micro, small and medium-sized enterprises based on the following criteria:

- **MICRO ENTERPRISE:** less than 10 employees; turnover less than EUR 2 million.
- **SMALL ENTERPRISE:** 10-49 employees; turnover less than EUR 10 million.
- **MEDIUM-SIZED ENTERPRISE:** 50-249 employees; turnover less than EUR 50 million.

SME INTERNATIONALIZATION

In this Methodology ‘SME internationalization’ refers to all activities that put SMEs into a meaningful business relationship with a foreign partner: exports, imports, foreign direct investment (relocation or outsourcing), international subcontracting and international technical cooperation.

STAKEHOLDER

A Stakeholder in the project Inter Ventures is any person, organisation or group that is affected by or who can affect the outcomes of this project. This means that the Stakeholder does not have to be a member of the Regional Stakeholder Group.

SME SUPPORT SCHEME

The national government or the EU may encourage SMEs via various support schemes such as, for example, tax benefits, innovation loans and grants.

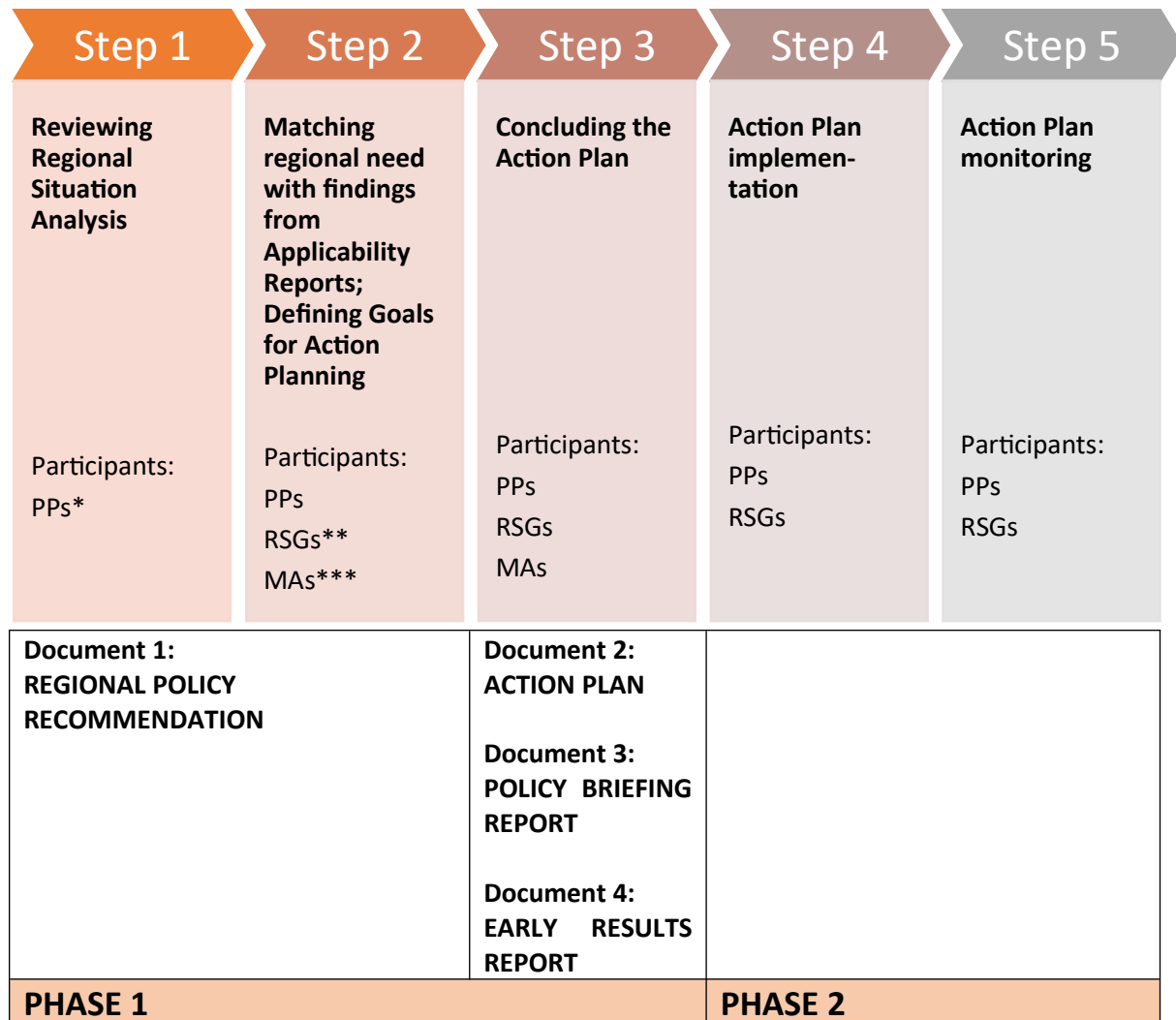
¹ Source: https://www.interregeurope.eu/fileadmin/user_upload/documents/Call_related_documents/Interreg_Europe_Programme_manual.pdf (pp.: 37)

² EU implemented a definition of SME concerning also its financial assets from 1st January 2005. This applies to all Community acts and funding programs as well as in the field of State Aid where SMEs can be granted higher intensity of national and regional aid than larger companies.

2. ACTION PLANNING

In order to enhance the SME internationalization in the EU border areas, Project Partners need to conduct an Action Plan to determine the steps towards the targeted Policy Change. The aim of this chapter is to provide the guidance in Action Planning to target the aims of the Inter Ventures project.

In the project Inter Ventures, the Action Planning process includes five steps as follows:



* PPs – Project Partners

** RSGs – Regional Stakeholder Groups

*** MAs – Managing Authorities

As a result of these five steps a tailor-made regional Action Plan will be elaborated that leads to the desired improvement of the selected regional ERDF or national programmes for the enhanced internationalisation of SMEs. During this process altogether four documents will be created: (1) Regional Policy Recommendation; (2) Action Plan; (3) Policy Briefing Report; and (4) Early Results Report.

As seen from the Figure above, many steps in the Action Planning process require the input from the Regional Stakeholder Group. In composition of Stakeholder group has to be kept in mind that at least some of the Stakeholders have to be those who implement measures of the Action Plan later on. This means that in case the targeted Policy Instrument is on the national level, the Managing Authority should be involved; when the targeted Policy Instrument is in regional level, the Managing Authority

and the key Stakeholder(s) who are responsible for the implementation of the measures later on at the regional level should be involved. The engagement methods for Stakeholders were discussed in the Methodology for Stakeholder Engagement. Before the start of the cooperation the roles of the Stakeholders in the policy instruments addressed by the project have to be defined.

Since the policy-making process is complex, with a variety of players involved, it is important that Stakeholders take part in the interregional learning process. This is because, in most cases, a single organisation cannot achieve changes in policy. Though, to increase the chance of achieving policy change, Project Partners should therefore actively involve relevant Stakeholders from their region in the activities of the project Inter Ventures.

In the light of current COVID-19 pandemic, involving Stakeholders is even harder than it would be under 'normal' conditions. We highly recommend Project Partners to keep the established contacts with Stakeholders and go online with the meetings, i.e. use mediums like Skype, GoToMeeting, BlueJeans or alike to keep the contact with Stakeholders. Also, as the process of Action Planning is supported by AEBR through online help desk and quality control, the Project Partners are encouraged to contact AEBR in case they have any questions or problems in the Action Planning process.

2.1. STEP 1: Reviewing Regional Situation Analysis

Reviewing the Regional Situation Analysis has to address the following subjects:

- SME capacities for internationalization in the Partner region including SMEs' barriers and needs regarding SME internationalization support;
- Policies and strategies targeted to SME internationalization in the Partner region (in national, regional and local level);
 - o Limitations of those policies and strategies;
- Instruments and tools for SME internationalization (provided by national, regional and local entities; provided by intermediate entities; provided by other actors).

This information forms the basis for the Action Planning process and will be described in the Regional Policy Recommendation under the section 2 "Baseline situation".

OUTCOME OF STEP 1:

Based on the previous information, a regional need is specified (what is the regional need for SME internationalization) leading to choosing the Policy Instrument that will be targeted through the Action Plan.

2.2. STEP 2: Matching Regional Need with Findings of Applicability Reports

Now when the Regional Need is specified and Project Partners have chosen the Policy Instrument that has to be targeted via the Action Plan, the Applicability Reports should be looked into. The Applicability Reports, which are composed based on the presentations and discussions about the Good Practices of all the Partner Regions, as well as the results of the Knowledge Sharing Workshops are the basis for this step.

The Applicability Reports are containing the following:

- the applicability of the good practice in the particular area;
- what is needed to adapt the good practice to the context of the particular area.

To help the Project Partners through this step, the First Regional Policy Workshop will be held.

FIRST REGIONAL POLICY WORKSHOP

Regional Policy Workshops will be held in each Project Partner Region with the aim to advise the participants about the whole Action Planning process. The First Regional Policy Workshop will be held only after all the Partner Regions have elaborated on their Applicability Report.

The agenda for the First Regional Policy Workshop will be provided by AEBR. It will consist the following:

- **identification of the potential policy improvements** in the respective Partner Region;
- **discussion of the possible actions** that can change the target Policy Instrument based on the template of the Regional Policy Recommendation (in Annex 2). For this, the Project Partners should have gone through the template of the Regional Policy Recommendation with their Managing Authority or the Regional Policy Instrument Owner;
- **Project Partners' goals for their Action Plans.** It is important to outline specifically what one wants to achieve with the Action Plan, as by doing this feasible goals are set. For setting goals, the GPs and their measures described in the Applicability Report are taken into account. The following questions should be addressed:
 - o what exactly should happen? What is the outcome?
 - o how (and with what measures) will you measure the progress?

Proposed deadline for conducting the First Regional Policy Workshop is **September 2020**. Because of the COVID-19 pandemic and the restrictions for the gatherings of people, Project Partners should be ready to participate in the First Regional Policy Workshop online.

Participants: Members of the Regional Stakeholder Group and representatives of the Policy Instrument Owner.

OUTCOME OF STEP 2:

Overview of the specific actions and measures describing the most appropriate ways to implement the policy improvements – draft Regional Policy Recommendation.

2.3. STEP 3: Concluding the Action Plan

Now, based on the gained knowledge, the specific actions and measures describing the most appropriate ways to change the policy frameworks and to reach the feasible goals in Partner Regions will be described. This activity (Step 3) has several stages. Each of them will be discussed below in their respective sections.

2.3.1. Composing the Regional Policy Recommendation

The first stage in conducting the Step 3 is to draw up a Regional Policy Recommendation. The purpose of the Regional Policy Recommendation document is to provide input for improvement of targeted Policy Instrument within each Partner Region in order to enhance the policy framework related to the support of SMEs internationalisation. To accomplish this purpose, the Regional Policy Recommendation will explore the targeted Policy Instrument as a basis to provide recommendations for the improvement.

The elaboration of the Regional Policy Recommendations is based on the collection of information from previous activities (e.g. webinars, Regional Situation Analysis), and discussion with Regional Stakeholders Group. The Regional Stakeholders Group (RSG) is crucial to the elaboration of the Regional Policy Recommendation as the RSG should provide inputs to the document. Each Project Partner is responsible for collection of inputs from its RSG, and to discuss and validate the recommendations that will be included in the report with the members of the RSG.

The Regional Policy Recommendation will be completed based on the 1st Regional Policy Workshop held (Step 2) and feasible goals defined as follows. Based on the workshop (Step 2), Project Partners should describe the planned interim policy improvements using the template in Annex 2. In this template, the Project Partner should focus more on how the applicable good practices can help to improve the Policy Instrument, how the lessons learnt can be transformed into action, and how the results of the Applicability Report can be used for these actions.

The Regional Policy Recommendation will be then reviewed by the Advisory Partner (AEBR). AEBR will give suggestions and advice for improving the Regional Policy Recommendation. The document should be improved by the Project Partners based on the suggestions of the Advisory Partner. The results of the final version of the Regional Policy Recommendation will be integrated into the Action Plan.

Deadline for finalizing the Regional Policy Recommendation is the end of **October 2020**

2.3.2. Regional Stakeholder Group Action Planning Webinar

The Regional Stakeholder Action Planning Webinars will be held in each Partner Region. The aim of the webinars is to review the actions included in the Regional Policy Recommendation and discuss how the actions can be improved and included in the Final Action Plan.

The Regional Stakeholder Group Action Planning Webinars are facilitated by the Project Advisory Partner (AEBR). The format of these webinars is similar to the Regional Situation Analysis Webinars, i.e. combining online lectures with Q&A sessions, on-site discussion and group work moderated by thematic internal and external experts of Project Partners.

Participants: Members of the Regional Stakeholder Group, respective Project Partners and AEBR

Proposed deadline for the Regional Stakeholder Action Planning Webinars is **November 2020 – January 2021**

OUTCOME OF THE WEBINARS:

The conclusions of the Webinars will be included into the Action Plan

2.3.3. Second Regional Policy Workshop

The Second Regional Policy Workshop will be held in each Partner Region with the aim to monitor the implementation of the actions included in the Regional Policy Recommendation and to discuss of the Final Action Plan.

The draft agenda for the Second Regional Policy Workshop will be prepared by the Project Advisory Partner (AEBR).

Participants: Project Partners, Regional Stakeholder Group members and the Policy Instrument Owner

Proposed deadline for conducting the Second Regional Policy Workshop is the end of **January 2021**

2.3.4. Composing the Policy Briefing Report

Based on the outcomes of the above actions, a Policy Briefing Report should be composed by each Partner Region. The aim of this document is **to make the recommendations for the next EU programming period**. The Policy Briefing Reports should be disseminated via a press conference (held during the 4th Interregional Meeting).

The Policy Briefing Report will be reviewed by the AEBR.

Proposed deadline for the Policy Briefing Report is the end of **January 2021** (will be presented during the last meeting in Phase 1). Partner regions should note that this is the very last deadline, preparing this document earlier if it is more relevant to send the recommendations to the MA is recommended.

2.3.5. Composing the Action Plan

Now all the base material is collected, systemized and synthesized, i.e. the Action Plan can be composed for each Project Region addressing their targeted Policy Instrument, aimed to boost the internationalisation of SMEs in their border regional SME systems.

A template for the Action Plan is provided in Annex 3 in this Methodology. This template includes all the core features that need to be described in the document. In fulfilling the Action Plan Template, please keep in mind that the core objective of the Action Plan is that it is useful and brings real added value to the region and stakeholders concerned. Below are some instructions for composing the best Action Plan.

ADD LOGO

It should be clear from the Action Plan document which partner organisation is concerned, i.e. the **logo of the Project Partner** should be included.

LANGUAGE

The language of the Action Plan is **English**.

CLEAR LINK WITH THE PROJECT

Each action included in the Action Plan should clearly derive from the project's learning and in particular from the interregional knowledge exchange (e.g. **link with the Applicability Report** is necessary). This means that the link between the action proposed and the inspiration source (interregional learning) should be clear. For instance, which good practice from one of the partner regions or which learning from a project activity inspired the action? It must be detail what particular elements or features of the good practice will be integrated into the action and how. This is to ensure that the inspiration coming from the project Inter Ventures is not lost. If an action cannot be related to the activities of the project, then it should not be included in the Action Plan. Since the Action Plan specifies how the learning from the project Inter Ventures will be transformed into actions, the

actions included in each Action Plan should in principle have a clear implementation related character.

LINK WITH THE POLICY INSTRUMENT

The actions proposed in the Action Plans must be included and supported through the targeted Policy Instrument. Project Partners should bear in mind that the actions foreseen in the Action Plans should primarily target the improvement of the Policy Instruments. The link with the policy instrument has to be clear, i.e.:

- the Action Plan should clearly show how these actions contribute to improve the targeted policy instrument(s);
- policy instrument(s) and though the actions should be targeted to improving the SME internationalization.

CLEAR AND PRECISE

Each action needs to be precisely defined and must lead to clearly measurable results. The implementation process of each action must be understandable (including information on the timeframe, resources needed, responsibilities and players involved). Most important in here is to know that the actions which include preliminary research / need analysis, meetings of working groups, and development of the action are not allowed – these actions should have been done already in the Phase 1 of this project. The main aim of the Action Plan is to provide for the owners of the Policy Instrument with an already conceptualized action that is clearly described and ready to be included, with minor adjustments, to the Policy Instrument. The latter means that it is also important to specify how far the Action Plan is endorsed by the relevant policy responsible organisation(s) in the region.

QUALITY VERSUS QUANTITY

There is no minimum nor maximum number of actions to be described in the Action Plan. It means that the document can include a very limited number of actions as long as the core features of these actions are sufficiently clear and detailed (i.e. relevance to the project, nature of the activities, stakeholders involved, timeframe, costs and funding sources).

FOCUS ON SUPPORTING SME INTERNATIONALIZATION

The aim of the project is to improve those policy instruments that directly support the internationalization of SMEs. In this respect, the Action Plan should include only actions directly contributing to supporting the internalization of SMEs.

ENDORSEMENT OF ACTION PLANS

The Action Plans are setting the guidelines for the Policy Instrument Owners about how to improve the targeted Policy Instrument. This means that the **Action Plans should be endorsed by the Policy Instrument Owner before submitting them to the Joint Secretariat.**

The Joint Secretariat has set the following rules for the endorsement:

- In the case of **new projects** (submitted under the targeted or other policy instruments) the endorsement should be obtained
 - o either from the organization responsible for the policy instrument or
 - o by the organization that commits itself to develop and submit the projects.
- In case of **policy influencing** actions that will be realized directly by:
 - o **the project partner which is the Managing Authority** of the addressed policy instrument, the endorsement can be done directly by the respective project partner.
 - o **an external Managing Authority** of the targeted policy instrument (who is not the member of the partnership), the endorsement can be done directly by this external MA.

The endorsement of the action plan can be done either by obtaining the signature directly on the action plan or through a letter of commitment signed by the relevant body.

PLEASE NOTE: An Action Plan should be written for each policy instrument indicated in the Application Form. If the improvement of the original Policy Instrument is not possible, Project Partners can decide to change their Policy Instrument and include another one which can belong to the next programming period. In such cases the Action Plans must include a thorough justification on why the initial Policy Instrument can no longer be influenced as well as the description of the new Policy Instrument approached.

Please note that most of the Policy Instruments from the next programming period are “Non-Existing” Policy Instrument yet. Some of them are currently under development so it will take time to exploit the opportunities for structural changes in these regional or even country level Policy Instruments!

Writing an Action Plan is a rather complicated process. To inspire the Project Partners, **examples of final Action Plans** can be found on the websites of projects [ERUDITE](#), [OSIRIS](#), [NICHE](#), [iEER](#) or [CLUSTERS3](#)).

Deadline: the Action Plan should be finalized and sent to the Joint Secretariat for **April 30, 2021**

CHECK LIST FOR SUBMITTING THE ACTION PLAN

Please go through the following list to check if everything required in the Action Plan is included.

- Logo of the Project Partner is on the template;
- Action Plan is written in English;
- Actions planned have a clear link with the project and with the targeted Policy Instrument;
- Actions and the targeted Policy Instrument are targeted to improve the SME internationalization in the particular region;
- The actions taken are clearly described and precise;
- There are clear links between each action and the interregional learning;
- The nature of each action is precisely defined;
- Focus is on implementation-related actions

2.3.6. Early Results Report

Finally, during Step 3: Action Plan implementation, each Project Partner has to provide an Early Results Report. The aim of the Early Results Report is to **summarise the implemented policy improvements of Phase 1** (see Template in Annex 4). The Report should be first submitted to the Project Advisory Partner (AEBR). After revision, the Early Results Report will be submitted to the Joint Secretariat.

Deadline for submitting the Early Results Report to AEBR: **30 June 2021**

2.4. STEP 4: Action Plan Implementation

After the Action Plan is finalized and approved by the Joint Secretariat, each Partner Region starts the implementation of its Action Plan together with the relevant Stakeholders. During the

implementation period, Project Partners have to provide regular updates on the project website with information on the Action Plan implementation.

2.4.1. Tips for Action Plan implementation

Below are some tips for the implementation of the completed Action Plan.

RESPONSIBILITIES

It is recommended that each member of the team is allocated individual roles and tasks which require completion by a set date. However, there must be chosen one person, who is responsible and accountable for tracing the progress, keeping team informed, ensuring timely action steps and adjusting the actions. This person is also responsible for providing thorough and effective guidance for his/her team members.

SUPPORT

For each action step, determine who will support the person responsible. This can be also multiple people. The key is that they're not responsible for the action or outcome.

COMMUNICATION

The communication within the team should be well managed, because the communication is needed for trust building.

Also, keeping the right people in the communication loop for each action step is critically important. Key people might need to understand the state of progress to see how they affect other actions and objectives. This means that each Project Partner has to discuss the Action Plan implementation process with the relevant regional stakeholders and beneficiaries.

METRICS AND BUDGET

To measure the progress of Action Plan implementation, each action step must have a metric that tells if the action is complete.

Each Project Partner has been given a budget for implementing the Action Plan. This amount of budget is indicated in the Annex of the Partnership Agreement.

MILESTONE DATES

There is a set time frame for the Action Plan implementation within the project Inter Ventures. In order to stay within the set time frame, each of the planned action steps should have both a begin and an end date to help the Project Partners stay on track.

In addition to setting the dates for each action step, the most important action steps – the ones that impact the final deadline the most - should be highlighted and within the action plan implementation it should be made sure that these milestone dates are kept. Below is an example list of the milestone dates:

- Start and end date of the project phases
- Key deliverables
- Approvals from the Policy Instrument Owner

RISK MANAGEMENT

Action Plan implementation is a long and complicated process. To make sure that everything runs smoothly, there should be a risk management plan or in other words a Plan B. This means that the

possibilities that could affect the progress should be examined and alternative solutions should be found. Below are some recommendations how to do it.

- **Think about potential problems while planning**, i.e. ask the following questions: what should cause a bottleneck effect in the Action Plan implementation process? What can be the weakest link in the implementation process?
- **Find replacements before you need them**, e.g. who can cover for the project manager? Find someone to approach in a case of emergency. Make sure you have interns or other employees who can undertake tasks in a case of emergency.
- **Interconnections within the team**. How do people depend on each other within your team when it comes to performing tasks? The best way to have an answer is to draw a visual and draw the connection between the tasks.
- **Keep an eye on the workload**. It is important to keep an eye on each team member's workload to spot the bottlenecks before they occur.
- **Be flexible**. Plans always keep changing. Try to review your current state as often as possible, at least once a week. If there is a bottleneck, start solving the problem as soon as possible.

2.5. STEP 5: Action Plan Monitoring

The aim of the Action Plan monitoring is to transfer the lessons learnt from the project into the positive change of the targeted Policy Instrument. Monitoring means regularly checking to which extent the measures described in the Action Plan are implemented on the ground, evaluating the results of these measures and gathering evidence of success to be reported to the programme. Action Planning Monitoring will be carried out during Phase 2 (1 August 2021 – 31 July 2022).

During Step 5: Action Plan Monitoring, each Project Partner is responsible for monitoring the progress of the implementation of their Action Plan and for reporting to the Lead Partner. Monitoring also includes contacting the relevant stakeholders and beneficiaries of the different actions.

It is highly recommended that Project Partners keep learning from each other also during this Step. For example, Project Partners can exchange of experience on success achieved or the difficulties encountered as certain measures of the Action Plan in one region may require the expertise of another region. In other words, when the measure relates to the transfer of a particular experience developed in one region, the 'importing' region may need the advice of the 'exporting' region on the best way to adapt the experience to its own context. This can be done via conducting webinars among respective Project Partners.

CONCLUSION

The Methodology provided in this document was targeted at Action Planning. The aim of this Methodology was to guide the Project Partners in creating a structured Action Plan that will provide motivation as well as certainty that by following the planned steps, the Policy Change will be reached, and will be reached without any wasted time and effort.

This Methodology was the fourth, and final, step in the project Inter Ventures which aims at **promoting the internationalization of SMEs in the EU border regions, thus contributing to their growth and increased competitiveness and enhancing the development of the EU border regions.**

This Methodology for Action Planning has been designed by the Association of the European Border Regions (AEBR) to support the project Inter Ventures' approach on internationalization of SMEs in the EU border areas.

ANNEX 1. Deadlines for Action Planning

Action	Deadline	References
First Regional Policy Workshop	September 2020	Section 2.2
Regional Policy Recommendation	October 2020	Section 2.3.1
Regional Stakeholder Group Action Planning Webinar	November 2020 - January 2021	Section 2.3.2
Second Regional Policy Workshop	January 2021	Section 2.3.3
Policy Briefing Report	April 2021	Section 2.3.4
Action Plan	April 30, 2021	Section 2.3.5
Early Results Report	June 30, 2021	Section 2.3.6

ANNEX 2. Regional Policy Recommendation Template

1. GENERAL INFORMATION

Project:	
Partner organisation:	
Other partner organisations involved (if relevant):	

2. POLICY CONTEXT

A. Main features and envisaged improvement of the policy instrument	
Policy instrument addressed	
Body responsible for addressed policy	
What influence does your organization have over the targeted Policy Instrument?	
<i>Maximum of 500 words</i>	
Evaluation of the current operation of the policy	
<ul style="list-style-type: none"> - How is it currently functioning? - What are the problems? 	
<i>Maximum of 1200 characters</i>	
What kind of change do you want to achieve in the addressed Policy Instrument? How would influence/improve the targeted Policy Instrument?	
<i>(Justify why this change is necessary for the SME internationalization)</i>	
<i>Maximum of 2000 characters</i>	

3. PLANNED ACTIONS

Action 1

Action title:	
Nature of the action	
<ul style="list-style-type: none"> - What is the content of the action? - How this action contributes to the improvement of the Policy Instrument? 	
<i>Maximum of 2000 characters</i>	
Interregional exchange of experience	
<ul style="list-style-type: none"> - Where does the inspiration for this action come from? - Please describe shortly the good practice - What good practise/element would you like to adapt/implement in your region? - How this lesson learnt will turn into action? How the good practice/element will build into your action? 	
<i>Maximum of 2000 characters</i>	

Action 2

Action title:	
Nature of the action	
<ul style="list-style-type: none"> - What is the content of the action? - How this action contributes to the improvement of the Policy Instrument? 	
<i>Maximum of 2000 characters</i>	
Interregional exchange of experience	
<ul style="list-style-type: none"> - Where does the inspiration for this action come from? - Please describe shortly the good practice - What good practise/element would you like to adapt/implement in your region? - How this lesson learnt will turn into action? How the good practice/element will build into 	

<i>your action?</i>
<i>Maximum of 2000 characters</i>

Action 3

Action title:	
Nature of the action	
<ul style="list-style-type: none"> - <i>What is the content of the action?</i> - <i>How this action contributes to the improvement of the Policy Instrument?</i> 	
<i>Maximum of 2000 characters</i>	
Interregional exchange of experience	
<ul style="list-style-type: none"> - <i>Where does the inspiration for this action come from?</i> - <i>Please describe shortly the good practice</i> - <i>What good practise/element would you like to adapt/implement in your region?</i> - <i>How this lesson learnt will turn into action? How the good practice/element will build into your action?</i> 	
<i>Maximum of 2000 characters</i>	

ANNEX 3. Action Plan Template

The final version of the Action Plan can be customized by each of the Project Partner based on its needs. Project Partners can design the Action Plan template as they want, however, the original content should be also left in the Action Plan. Furthermore, the instructions and additional comments and requests should be removed, only the final Action Plan will be submitted to the Joint Secretariat.

ACTION PLAN FOR THE [NAME OF THE PROJECT PARTNER]

1. GENERAL INFORMATION

Project:	
Partner organisation:	
Other partner organisations involved (if relevant):	
Country:	
NUTS2 region:	
Contact person:	
Email address:	
Phone number:	

4. EXECUTIVE SUMMARY

Executive summary Please summarize the main goals of the Action Plan <i>Maximum of 3000 characters</i>

2. BASELINE SITUATION

Policies and strategies targeted to internationalization of SMEs (provide information about the policy framework for internationalization of SMEs including strategies at national and regional level; and budget) <i>Maximum of 2000 characters</i>
Instruments and tools for internationalization - provided in national, regional and local level; - provided by Intermediate Entities; - provided by other actors <i>Maximum of 2000 characters</i>
SMEs barriers and needs regarding internationalisation support - a brief synthesis of the main barriers and drivers; - how these identified barriers and drivers can be considered as opportunities to improve the internationalization support <i>Maximum of 2000 characters</i>

3. POLICY CONTEXT

The Action Plan aims to impact:	Investment for Growth and Jobs Programme
	European Territorial Cooperation Programme
	Other regional development policy instrument
Name of the Policy Instrument:	
Body responsible for addressed	

policy	
What influence does your organization have over the targeted Policy Instrument?	
<i>Maximum of 1000 words</i>	
Please evaluate the current operation of the policy! How is it currently functioning?	
<i>Maximum of 1000 characters</i>	
Description of the problem(s) with the Policy Instrument (what problem needs to be targeted)	
<i>Maximum of 2000 characters</i>	
What kind of change do you want to achieve in the addressed policy? (Justify why this change is necessary for the SME internationalization)	
<i>Maximum of 2000 characters</i>	
Self-defined indicator	
Target value of the indicator	
Description of the situation after the Policy Instrument is targeted	
<ul style="list-style-type: none"> - What has changed so far thanks to the project? (what is the specific outcome?) - What kind of change do you envisage (new call, new project, modified priorities, calls, monitoring/evaluation producers, etc?) - How can the outcome be measured? (provide indicators) - Please justify why the change necessary to implement your Actions? 	
<i>Maximum of 2000 characters</i>	

4. DETAILS OF THE ACTIONS ENVISAGED

Action 1

Action title:	
Nature of the action	
<ul style="list-style-type: none"> - What is the content of the action? - What are the specific activities to be implemented? - Why this action is important? - How this action contributes to the improvement of the Policy Instrument? 	
<i>Maximum of 2000 characters</i>	
Linkage between the Action and the Policy Change:	
<ul style="list-style-type: none"> - <u>In case the action is a policy change</u> please describe it thoroughly referring to the policy improvement (if the action for example the modification of the evaluation criteria of a call, then please describe how it contributes to the improvement of the policy which you explained in general in the policy context part) - <u>In case the action is not a policy change</u> please describe in detail the connection between the action and the policy change! How the policy change contributes to the action? (for example: to carry out action 1., we plan a new project for... (policy change linked to the action) 	
<i>Maximum of 2000 characters</i>	
Interregional exchange of experience	
<ul style="list-style-type: none"> - Where does the inspiration for this action come from? - From whom (partner, good practice holder, expert); - Name of the good practice - Please describe shortly good practice 	
<i>Maximum of 2000 characters</i>	
Transferred elements	
<ul style="list-style-type: none"> - What good practise/element would you like to adapt/implement in your region? - How this lesson learnt will turn into action? How the good practice/element will build into your action? 	
<i>Maximum of 2000 characters</i>	
Stakeholders involved	

<ul style="list-style-type: none"> - What organizations are involved in the implementation of the action? - What is their role? - Who is responsible for implementation of this action? 		
<i>Maximum of 2000 characters</i>		
Cost of the action: Please estimate the costs related to the implementation		
Resources: Please describe how the action will be financed funds? Are there any financial available to implement the action		
Action steps (what will be done)	Responsibility (Who will do it – reference to the stakeholder involvement)	Timeline (start and end dates)

Action 2

Action title:		
Nature of the action <ul style="list-style-type: none"> - What is the content of the action? - What are the specific activities to be implemented? - Why this action is important? - How this action contributes to the improvement of the Policy Instrument? 		
<i>Maximum of 2000 characters</i>		
Linkage between the Action and the Policy Change: <ul style="list-style-type: none"> - <u>In case the action is a policy change</u> please describe it thoroughly referring to the policy improvement (if the action for example the modification of the evaluation criteria of a call, then please describe how it contributes to the improvement of the policy which you explained in general in the policy context part) - <u>In case the action in not a policy change</u> please describe in detail the connection between the action and the policy change! How the policy change contributes to the action? (for example: to carry out action 1., we plan a new project for... (policy change linked to the action) 		
<i>Maximum of 2000 characters</i>		
Interregional exchange of experience <ul style="list-style-type: none"> - Where does the inspiration for this action come from? - From whom (partner, good practice holder, expert); - Name of the good practice - Please describe shortly good practice 		
<i>Maximum of 2000 characters</i>		
Transferred elements <ul style="list-style-type: none"> - What good practise/element would you like to adapt/implement in your region? - How this lesson learnt will turn into action? How the good practice/element will build into your action? 		
<i>Maximum of 2000 characters</i>		
Stakeholders involved <ul style="list-style-type: none"> - What organizations are involved in the implementation of the action? 		

<ul style="list-style-type: none"> - What is their role? - Who is responsible for implementation of this action? 		
<i>Maximum of 2000 characters</i>		
Cost of the action: Please estimate the costs related to the implementation		
Resources: Please describe how the action will be financed funds? Are there any financial available to implement the action		
Action steps (what will be done)	Responsibility (Who will do it – reference to the stakeholder involvement)	Timeline (start and end dates)

ActionX (If you have further actions please copy Action Table below):

Date: _____

Name of the organisation(s) : _____

Signatures of the relevant organisation(s): _____

ANNEX 4. Early Results Report Template

1. GENERAL INFORMATION

Project:	
Partner organisation:	
Other partner organisations involved (if relevant):	

2. TARGETED POLICY INSTRUMENT

Name of the Policy Instrument:	
Operation of the policy before the implementation of the Action Plan	
<i>Maximum of 1000 characters</i>	
Description of the problem(s) with the Policy Instrument that were targeted	
<i>Maximum of 2000 characters</i>	
What kind of change was intended to achieve in the addressed policy? (Justify why this change is necessary for the SME internationalization)	
<i>Maximum of 2000 characters</i>	
Self-defined indicator	
Target value of the indicator	
Describe the actions taken	
<ul style="list-style-type: none"> - What specifically has been done so far? - Who has done what? 	
<i>Maximum of 2000 characters</i>	
Description of the situation after the Policy Instrument is targeted	
<ul style="list-style-type: none"> - What has changed so far thanks to the project? (what is the specific outcome?) - What kind of policy change/policy influence has been achieved by the end of Phase 1 (new call, new project, modified priorities, calls, monitoring/evaluation producers, etc?) - How can the outcome be measured? (provide indicators) - Please justify why the change necessary to implement your Actions? 	
<i>Maximum of 2000 characters</i>	

ANNEX 5. Policy Briefing Report Template

POLICY BRIEF FOR THE 2021-2027 PROGRAMMING PERIOD

Written by: [name of the author/ organization]

Executive statement

Outline your main message – what do you want to say and to whom (may: 500 characters)

About the project

A brief outline of the aims of the project Inter Ventures and description of what you did to address the problem within this project (max: 1000 characters)

Context

Outline the problem and any relevant contextual information and political background. State why the problem is urgent and important. Use evidence and infographics to support your argument (max: 2000 characters)

Results, conclusions and recommendations

1. Describe what you want your audience to do about the problem using evidence from the project to back up your recommendations. Make sure the recommendations are (max: 2000 characters)

- Short
- Practical and realistic
- Concrete (avoid generic recommendations)
- Based on evidence from the project
- Clear and easy to understand
- Written so that the sentences start with a verb, e.g. Use ..., Engage ..., etc

2. Please describe each of your recommendation in detail:

Recommendation 1 (max: 1500 characters)

Recommendation 2 (max: 1500 characters)

Recommendation 3 (max: 1500 characters)

References

Only include maximum of four sources where readers can find further information. Give the web addresses of publications and dates for when they were last accessed if possible.

