

*Support to the Region Sud Provence Alpes Côte d'Azur*

# ***Mainstreaming and Capitalisation of cooperation projects***

## **FINAL REPORT**

*March 2022*

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## Introduction

In short, the *"support contract for the South Provence Alpes-Côte d'Azur Region for the mainstreaming and capitalisation of European projects"* aimed to support Horizontal and Strategic projects co-financed by the Interreg MED programme in the implementation of their transfer and mainstreaming activities. These projects were selected in several waves between 2018 and 2020 and will end in June 2022.

The final report of this mission<sup>1</sup> aims to report on the activities carried out and to highlight the feedback, good practices and difficulties encountered in order to draw lessons for the operational modalities of the programme and projects of the 2021-2027 programming period.

The first part looks back at the course of the mission with a critical review of the type of support provided.

The second part deals more specifically with the assessment of the support and the outputs of Horizontal and Strategic projects in their capitalisation process.

The third part highlights the main lessons to be learned from this support and the recommendations for the new programming period.

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<sup>1</sup> Contract support to the South Provence Alpes Côte d'Azur Region for the Mainstreaming and Capitalisation of European projects, Lot 1 PANORAMED, November 2019

## 1. Summary of activities carried out

The support mission for Horizontal and Strategic projects of the Interreg MED programme is based on the experience gained during the previous mission, which aimed to test the implementation of a mainstreaming approach with six major national or regional actors in the Mediterranean<sup>2</sup>.

A number of strategic and operational recommendations were drawn from this mission, including the need to set precise and realistic objectives in terms of transfers, the need for early contact between givers and takers, the importance of available resources and the commitment of givers, and the need for continuous and structured monitoring and facilitation to ensure the success of the initiatives.

The main characteristic of the current mission is to position itself not on the side of the "Takers" but on the side of the projects (Horizontal and Strategic) in charge of producing and/or promoting the transfer and mainstreaming processes towards other actors and other territories. To do this, the following approach was proposed:

### 1.1. Definition of methodological tools to support the implementation of capitalisation and mainstreaming approaches (working documents)

The "working documents" consisted of templates made available to the partners to facilitate the implementation of their approach. These templates included (see **Annex 1**):

- ☐ A **checklist for the selection of relevant projects** (selection criteria, observations, etc.)
- ☐ A **givers identification sheet** with a description of the projects concerned, the outputs available, their technical specificities, the resources available, the transfer potential
- ☐ A **taker identification sheet** with a presentation of the institutions, their needs, and the expected contribution of the transfer process to their own objectives
- ☐ A **transfer plan** (identification of objectives, means, people involved and steps to be taken by each project to transfer its outputs)

These documents provided an important starting point for projects that lacked methodological guidelines and operational working tools.

Experience has shown that project situations are very different and that it is not realistic to apply an overly formal and standardised approach. The projects therefore used these tools in a rather flexible way, with the support provided concentrating on providing personalised advice and organising exchanges of experience between projects.

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<sup>2</sup> See the latest evaluation report "Mainstreaming experimentation - final report - Region Sud Provence Alpes-Côte d'Azur - Novembre 2020 »

## 1.2. Coaching and organisation of group meetings

The project support mission was based on individual and collective monitoring of the projects in order to respond to the specific technical and methodological needs of each of them (difficulties in mobilising "givers", communication, identification of relevant outputs, mobilisation of "takers", etc.) and to share the approaches, experiences and tools that they themselves had experimented and developed during this process.

**Individualised coaching** was more important in the first part of the mission when the working documents listed in point 1.a were circulated. The experts conducted **individual interviews with each project in March and April 2021** to gain a better understanding of their objectives and needs and to specify the support to be provided. Subsequently, individual exchanges continued with each project in the form of telephone calls, video conferences or e-mail exchanges.

**Collective coaching** was provided through the organisation of collective meetings. At the beginning of the mission, two collective meetings were envisaged in the third quarter of 2021 and in the second quarter of 2022.

In order to be able to provide more effective support to the projects, these meetings have been modified with a third meeting in June 2021. The fourth collective meeting has also been brought forward to February 2022 to coordinate with the end of PANORAMED. In order to maintain an active support to the projects and to meet their expectations as well as possible, two other meetings ("focus groups") have been added to the mission and organised in November 2022 (focus on the identification of the outputs and the mobilisation of the "Givers" on the one hand and on the mobilisation of the "Takers" on the other hand).

### Summary of the working meetings held with the projects:

- 19-20 February 2020: meeting on the coordination mechanism of the MED programme (Madrid). Exchanges in sub-groups with the partners of the MED projects
- 11 June 2020: Presentation meeting of the MED platform with Horizontal and Strategic projects
- 3 July 2020: first collective meeting with Horizontal and Strategic projects to present the support approach and identify their needs
- 16 October 2020: second collective meeting with Horizontal and Strategic projects
- March-April 2021: organisation of individual meetings with each project (needs analysis)
- 22 June 2021: third collective meeting
- 4 November 2021: first focus group ("stakeholder mobilisation")
- 30 November 2021: second focus group ("an operational and successful transfer process")
- 17 February 2022: fourth collective meeting (finalisation of the mission)

Working meetings organised with the Région Sud :

- 3 March 2020: mission launch meeting
- 2 April 2020: MED platform preparation meeting
- 18 May 2020: meeting to set up the MED platform
- 23 September 2020: PANORAMED Steering Committee (Cyprus - Online) - presentation of Mainstreaming activities
- 22 April 2021: update on current activities
- 28 May 2021: preparation of the collective meeting
- 14 June 2021: seminar with the JS and horizontal projects
- 21 September 2021: follow-up meeting with the Région Sud
- 19 October 2021: working meeting with the Région Sud on the monitoring of strategic projects
- 5 January 2022: Technical meeting on the progress of the mission
- 3 February 2022: participation in a presentation meeting for applicants to the first EURO MED 21-27 call for projects

Due to the health situation, all of these meetings were held remotely (except for the kick-off meeting in February 2020 in Madrid).

### **1.3. Drafting of working papers and syntheses to collect and share experiences implemented during the transfer and mainstreaming processes**

The collective meetings and focus groups mentioned above gave rise to the drafting of presentation documents and summary documents distributed to all participants.

As the support mission progressed, each project was gradually able to develop its own approach and tools for implementing the transfer and mainstreaming approaches. It then became necessary **to ensure a structured collection of all these experiences** and to be able to share them with all the participants.

This approach took the form of "**Factsheets**" which represent a very detailed, qualitative deliverable ready to be shared at the end of the mission (see Annex 2). This deliverable was made available to the projects through the Platform of the Interreg MED programme as well as through a DropBox link of the service provider allowing access to all the corresponding files and folders.

This deliverable consists of:

- Factsheet 1: Identification of outputs
- Factsheet 2: Identification of takers

- Factsheet 3: Transfer process
- Factsheet 4: Technical Forms
- A specific folder for each Factsheet which contains all the documents mentioned by the projects in the presentation of their activities (accessible by hyperlink)
- Summary of Focus Group 1 discussions on the mobilisation of takers
- Summary of Focus Group 2 discussions on how to better transfer the outputs.

This deliverable is an important output of this mission and is presented in a format that allows for its wider dissemination.

It should be noted that the **MED Platform**, which was considered at the beginning of the mission as an important support for the dissemination of information and the sharing of experience between projects, has not been used as much as expected by the projects. Although it is a necessary tool for making documents available, it has been little used for "live" exchanges of experience between projects. Experience shows that a more interactive use of the platform would have required much more work in terms of animation, which was not part of the expectations of this mission.

## 2. Technical and methodological assessment of the support to horizontal and strategic projects

The support for horizontal and strategic projects took place in a particular context marked by the following points

- Structurally different projects with, on the one hand, Horizontal projects in charge of animating groups of modular projects and valorising their outputs and, on the other hand, Strategic projects composed of key institutional partners and focused on the achievement of targeted objectives
- Different timeframes between the two generations of Horizontal projects (launched successively in 2019 and 2020) and with the strategic projects that started later (in 2020)
- A significant diversity of situations within the same project categories, due for example to the greater or lesser availability and willingness to collaborate of modular projects in relation to the corresponding Horizontal projects.

In summary, the following main observations can be drawn from the method of support provided to Horizontal and Strategic projects:

- Importance of the technical tools proposed at the beginning of the mission (form for analysing outputs, identifying "givers" and "takers", transfer plan) to enable the partners to understand the logic of a transfer/mainstreaming approach, to identify the main points of attention and to concretely initiate their approach
- The limit of an approach that would be too standardised by identifying tools, methods and principles applicable to all projects. Experience has shown that after a few weeks, each project was faced with specific problems which required flexibility and the development of tools or personalised working methods. In this case, the role of the experts was to capitalise on these multiple experiences (via factsheets) and to stimulate direct exchanges between projects (focus groups)
- In connection with the previous point, projects were quick to express a strong need for exchange of experience with direct discussions between project partners. This approach proved to be essential in order to go into more detail about mainstreaming approaches and to highlight solutions better adapted to the diversity of the projects
- Importance of analysing experiences and keeping as detailed a record as possible of the solutions developed by the projects themselves (factsheets), whether to share experiences at a given time, to help projects in their reporting, or to facilitate the transfer of experience from one programme to another.



### LESSONS LEARNED FROM THE FOCUS GROUPS

- ☐ Importance of ownership and administrative capacity building of institutional partners, especially to improve public policies and practices
- ☐ Importance of directly involving high-level institutions (ministries or equivalent) in projects. High added value to reach other takers and share existing results (top-down approach)
- ☐ High-level institutions develop tools that are not always adapted to local actors. ETC projects can act as intermediaries
- ☐ The level of involvement of modular projects in the transfer process has been different in each thematic community and has been at the discretion of each. In this respect, a formal commitment from the givers appears to be necessary for the entire duration of the programming period, in particular to use the content of some closed modular projects when necessary.
- ☐ When the Giver and Taker speak the same language and share the same administrative context, the transfer process seems to be easier than in the case of actors from different countries.

### Main recommendations:

1. Standard projects should be part of a wider framework (thematic communities, Horizontal and Strategic projects...). They should also feel part of the process, and share results as a "natural" step in the project cycle. Finally, the fact that some projects are still ongoing and have funding makes a difference in their degree of mobilisation, which should lead the Euro-MED programme to act accordingly in the design of the overall architecture.
2. The culture of "coopetition" should be promoted to facilitate the participation of "competing" modular projects in collaborative approaches of project communities. In this respect, the process of calls for projects, the criteria for the selection / funding of projects and even more so the culture of Interreg projects should be adapted accordingly by the programme managers.
3. Some modular 'capitalisation' projects may feel that they are already integrated and do not feel the need to be active in the mainstreaming process. It is likely that the name 'capitalisation' will need to be changed in the future. All projects (not only the modular "capitalisation" ones) are cooperation projects (Interreg), and they should be ready to share with other organisations and territories.
4. Collaboration between Horizontal and modular projects needs to be strengthened. In addition, modular projects need funds to cover the costs of mainstreaming, as some of the outputs/results are complex and take a long time to reappropriate. Modularity also needs visibility when mainstreaming.
5. Mainstreaming should be mandatory, and resources/budget should be provided at project or horizontal project level. Horizontal projects should be able to cover the costs of completed

modular projects.

6. The relevant sections of the application form for modular projects should be adapted. All modular projects should be fully aware of this and prepare results in a "transfer/mainstreaming format" (tutorials, toolkits, value-added sheet aimed at potential re-users).
7. A differentiation of the mainstreaming/transfer process can be introduced according to the logic adopted, either in the same region/country (less complex) or in a different country (more complex) considering that the requirements and expected results differ significantly. The support mechanism (budget allocation, programme/expert support engineering, etc.) should be adapted accordingly.
8. The Euro-MED programme should provide guidance with tools and templates to be used by all, e.g. support document for the adaptation of the reuse of high-value and replicable products, formal commitment of each party, donors and recipients, step-by-step coaching for a successful transfer process, etc. A lead JS manager and/or external experts (inspired by the URBACT practice) should permanently support future community projects.
9. Considering that the Strategic projects report a long period of time needed to get to know their partners, as the partnerships were created in a top-down manner, for the future these projects should bring together key partners of other highly relevant projects rather than targeted institutions identified at national level.
10. Importance of reaching out to stakeholders outside the Interreg sphere and opening up the Horizon of projects. The Euro-MED programme should better support this logic in each country of the area, in close connection with the national contact points.

### 3. Key success factors and pitfalls to avoid in transfer/mainstreaming processes

#### 3.1. Main points of method to remember - feedback

The mission to support Horizontal and Strategic projects made it possible to mobilise a body of knowledge, experience and tools tested during the previous missions. From these experiences, guidelines in terms of method were drawn, which were used to guide these two types of projects in their approach.

Certain major principles were confirmed by this accompanying mission and can be recalled:

- Need to have a **precise knowledge of the available outputs** and the existence of **detailed information and technical documents in a specific format** allowing their transfer (to be specified in the calls for modular projects concerning the content of reporting, communication, etc.)
- Take into account the fact that **not all outputs are necessarily relevant to initiate a transfer and mainstreaming process**. An exhaustive analysis of outputs can be very cumbersome to carry out with uneven results. It is important to favour a targeted and realistic approach to data analysis.
- **Ensure the availability of "Givers"** (modular projects) who, once their project has been completed, do not necessarily have the time and means to engage in a transfer process. This point raises the question of the "status" of modular projects and the requirements set out in the calls for projects (obligation or not to engage in a transfer and mainstreaming approach, according to what methods and with what means? ).
- **Pay particular attention to the consideration of demand ("Takers")**, bearing in mind that an output is only relevant to transfer if it corresponds to the needs of other stakeholders. In this respect, even an imperfect or partial knowledge of the needs of potential reusers is an undeniable asset and makes it possible to adopt an overall demand-driven approach that is generally more effective
- **Provide significant resources for the work of facilitating and mobilising** Givers and Takers, as well as the necessary resources (budgetary, human) to ensure effective transfer processes in the medium to long term.

In terms of process, the projects followed relatively similar approaches, although they may have varied in their implementation. The main stages of their mainstreaming approaches were as follows:

**STEP 1:** Identification of the most important outputs with a strong potential for transfer (tools, data, knowledge, methodology, good practice, regulations, etc.) in relation to the projects at the origin of these outputs (Givers)

**STEP 2:** Identification of relevant partners for the transfer and mainstreaming process ("Takers") - International, European, national, regional organisations, etc. Need to be realistic by using nearby

actors, existing networks and, if necessary, by going to seek out more distant institutional actors (national, international level). Interest in exploring possible connections with the associated partners of the Interreg MED programme, which may constitute privileged contacts such as: CPMR, Plan Bleu, Union for the Mediterranean, EUSAIR, WESTMED....

**STEP 3:** Check with the "Takers" what they really need and if necessary, adapt the offer in line with the projects behind the outputs (workshops, technical meetings, etc.). Develop a method of communication (form, content) capable of arousing the Takers' interest (communication strategy, lobbying, advocacy, etc.)

**STEP 4:** Develop a transfer strategy and plan with operational activities (meetings, workshops, key events, working documents, deadlines...).

**STEP 5:** Proactively facilitate/maintain the process. A transfer/mainstreaming process requires strong involvement and regular contact in order to maintain a high level of commitment from the partners (designate a person dedicated to this work).

### 3.2. Summary of recommendations for transfer and mainstreaming processes

This assignment highlights some of the potential success factors and pitfalls to be considered in the development and implementation of transfer and mainstreaming approaches by programmes. These points could usefully be considered for programmes in the period 2021-2027.

Key success factors
<ol style="list-style-type: none"> <li>1. <b>A framework and specific means made available to the beneficiaries to encourage and support them in the transfer and mainstreaming process:</b> <ul style="list-style-type: none"> <li>▶ <i>Possibility of integrating transfer and mainstreaming approaches in the project life cycle (dedicated financial means / workpackage)</i></li> <li>▶ <i>Use of calls for projects specifically dedicated to transfer and mainstreaming approaches</i></li> <li>▶ <i>Setting up external support, coordination and animation mechanisms ("umbrella" projects, horizontal projects, governance projects, external expertise...)</i></li> </ul> </li> <li>2. <b>An operational and realistic approach to transfer and mainstreaming actions (meeting supply and demand)</b> <ul style="list-style-type: none"> <li>▶ <i>Adapt transfer and mainstreaming objectives to the nature of the available outputs (not everything is "transferable", not all project outputs are intended to influence public policy...)</i></li> <li>▶ <i>Produce and mobilise outputs that are coherent with the "demand" (taking into account the needs of local, regional, national actors...)</i></li> <li>▶ <i>Involve target actors as much as possible in the definition of projects (associated partners, potential takers...)</i></li> <li>▶ <i>Set up structured approaches (transfer plans...) with the necessary human resources to</i></li> </ul> </li> </ol>

*organise exchanges between supply and demand*

### **3. Support for the creation of geographical and thematic communities or networks around the issues of European territorial cooperation<sup>3</sup>**

- ▶ *Inform and raise awareness among regional and national institutional actors about INTERREG's assets and outputs (mobilisation of national authorities and national contact points)*
- ▶ *Technical and financial support for exchanges between Interreg stakeholder communities (networks, project communities, thematic communities, etc.)*

### **Pitfalls to avoid**

#### **1. A sometimes divergent understanding of the notions of reference**

- ▶ *Clarify the differences between 'capitalisation', 'transfer', 'mainstreaming' and their implications in terms of the results to be achieved<sup>4</sup>*

#### **2. Limitation of an exhaustive exploitation of existing outputs**

- ▶ *Prioritise the outputs of projects to be valorised according to their potential (coherence with demand, availability of Takers, etc.). Not everything is relevant for a transfer or mainstreaming approach*

#### **3. Procedures that can be complex and administratively burdensome for projects**

- ▶ *Set clear and targeted objectives and give projects room for manoeuvre on the method to be applied and the level of objectives to be achieved (from the simple sharing of a practice to the evolution of a public policy)*
- ▶ *Keep in mind that INTERREG projects are themselves cooperation and experience sharing projects*

<sup>3</sup> One of the main lessons of this mission is the central role played by the communities of actors and projects, promoted in particular within the Interreg MED programme (Horizontal projects). These communities allow on the one hand to bring together the diversity of actors necessary for the crossing of supply and demand ("givers" and "takers") and on the other hand to structure the exchanges on the medium and long term.

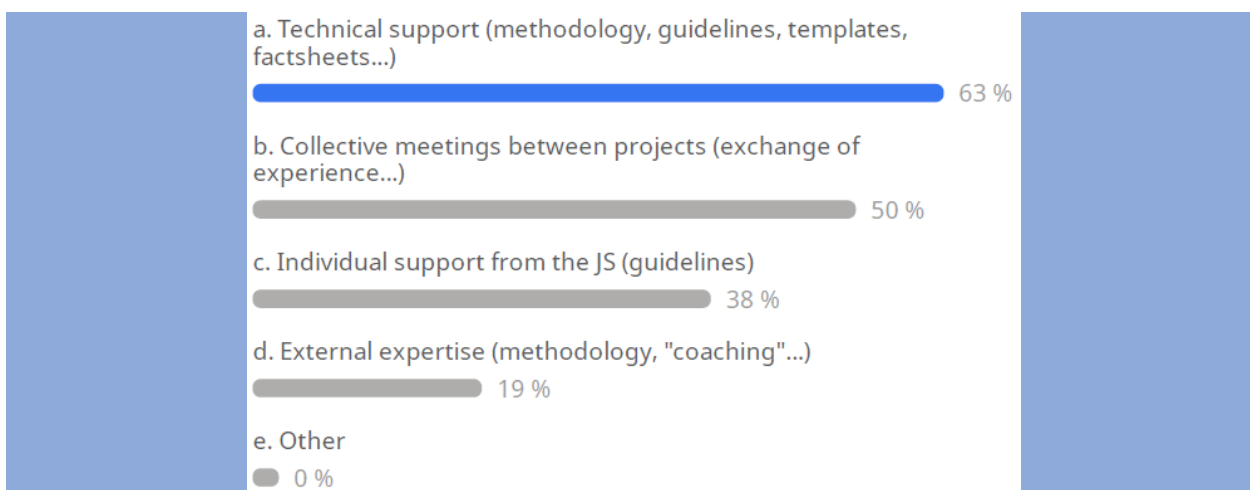
<sup>4</sup> See INTERACT's work on this subject (in particular the "Capitalisation Management Guide" (<https://bit.ly/3HLxaNo>))

### 3.3. Remarks and recommendations from Horizontal and Strategic project partners

On 17 February 2022, the last collective meeting with the Horizontal and Strategic projects was held. About thirty partners from these two categories of projects took part. One of the objectives of this meeting was to exchange with the projects on some methodological issues and to collect their remarks and recommendations for the new programming period, and in particular for the implementation of the governance and modular projects of the new EURO-MED programme. The exchanges were organised around the following questions:

#### 1. What kind of support can be useful for "governance projects" to foster mainstreaming activities?

##### Participants' responses

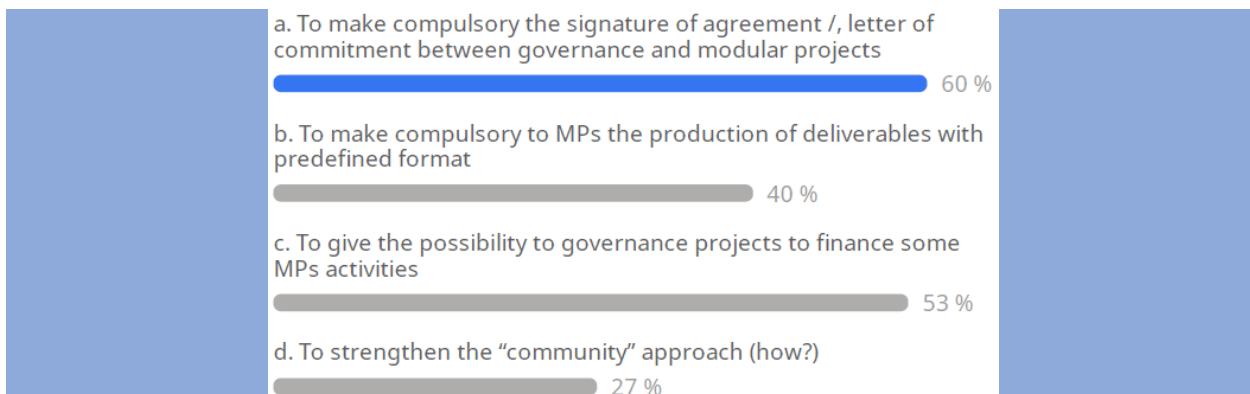


##### Remarks, recommendations:

- Usefulness of the collaboration with PANORAMED, in particular with the setting up of working groups involving institutions and policy makers. Importance of *position papers* to identify key issues, strategic orientations in the Mediterranean and to serve as a basis for discussion in the working groups
- Importance of developing and using technical support (expertise) and working documents (forms, guides...) in an active way with continuous input from project partners (continuous upgrading)
- Meetings between projects are very important (horizontal projects...) to share practices and improve work processes
- For 2021-2027, there is a need to move from "transfer" to real "mainstreaming" approaches aiming at having a concrete impact on public policies. The support of a mechanism such as PANORAMED is useful to reach and mobilise high level policy makers

## 2. What are the main priorities for strengthening the future relationship between 'governance projects' and 'modular projects'?

### Participants' responses:

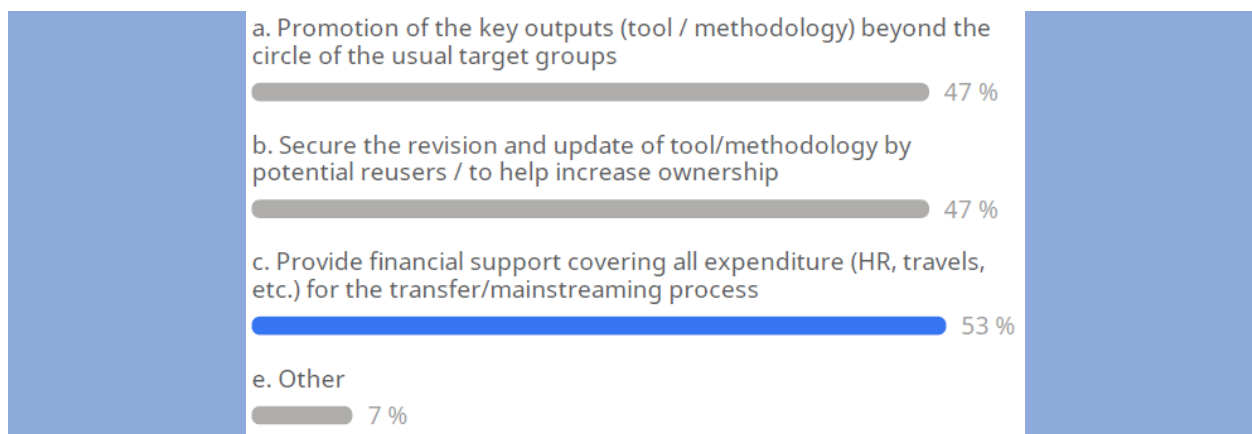


### Remarks, recommendations :

- It is not enough to sign a letter of commitment between governance projects and modular projects to ensure the participation of the latter in the transfer/mainstreaming process. This should be included in the contract signed with the modular projects (process of cooperation with governance projects and linkage with indicator systems). In doing so, modular projects should integrate from the beginning that they are linked to governance projects, and this should be reflected in the indicators.
- The outputs of the modular projects should be designed with a transfer/mainstreaming objective and perspective (contribution to public policies...). The predefined forms can help modular projects to understand what is expected of them
- Need to better specify the concrete mechanism of involvement of modular projects in mainstreaming approaches (time and effort to be devoted to governance projects). A dedicated section in the application form for modular projects could help to anticipate the requirements of governance projects
- Governance projects need specific skills and expertise (human skills, not just institutional skills)
- Need to strengthen the community approach (importance of "sense of community"), commitment of all stakeholders, and to have regular exchanges (e.g. every six months) to adapt the methods or work plans of the thematic communities (cooperation process with dedicated budget)
- To be explored: development of a more formal/binding mechanism in which a share of the budget of the modular projects would be subject to the agreement of the governance projects (a kind of "reserve" that could be used according to the deliverables transmitted to the governance projects)

### 3. What are the most effective ways of motivating and mobilising the partners who produce outputs ("Givers")?

#### Participants' responses:



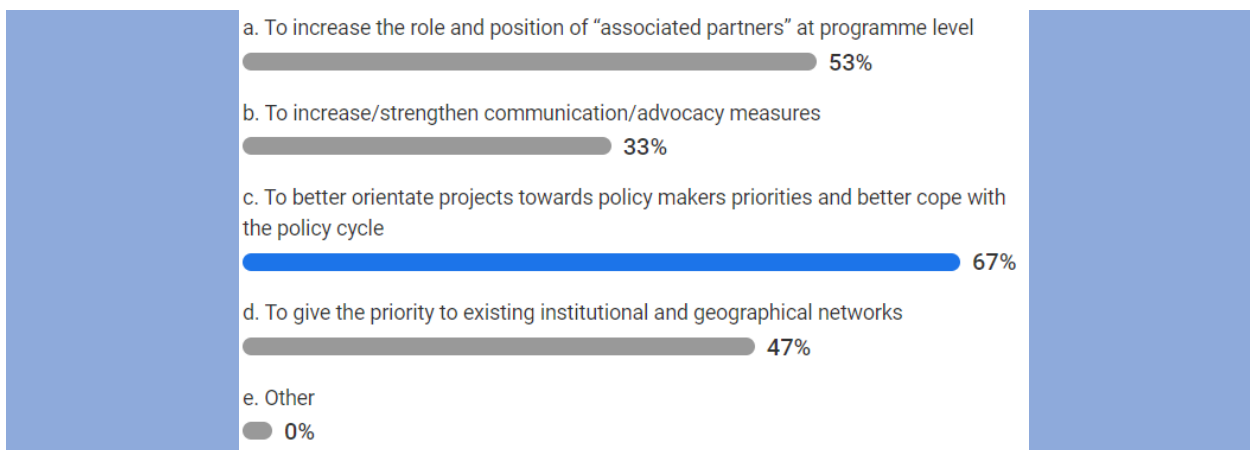
#### Remarks and recommendations:

- Usefulness of including in the budget of modular projects (MP) the possibility to cover expenses related to sharing/transfer activities
- Need to improve the connection between modular projects and governance projects. Have an intermediate period between the two (transition period after the end of the MP). Ensure the transfer of outputs with a transition period, if necessary to prepare/adapt these outputs to the transfer process
- Some projects have clear objectives and others do not have a specific policy objective, but provide content (in terms of process or information/awareness raising). Both types of outputs are useful for mainstreaming
- Not all project outputs have the same transfer potential. Importance of assessing the replication potential of outputs upstream
- Potential takers may have difficulties in integrating even very good quality outputs (marketing needs, communication, how to contact takers...). Very often, takers are not clear on how to use the available outputs
- Importance of having more meaningful support for the mainstreaming process (along the lines of PANORAMED?)



#### 4. How can we better involve the Takers, especially the high-level institutions?

##### Participants' responses:

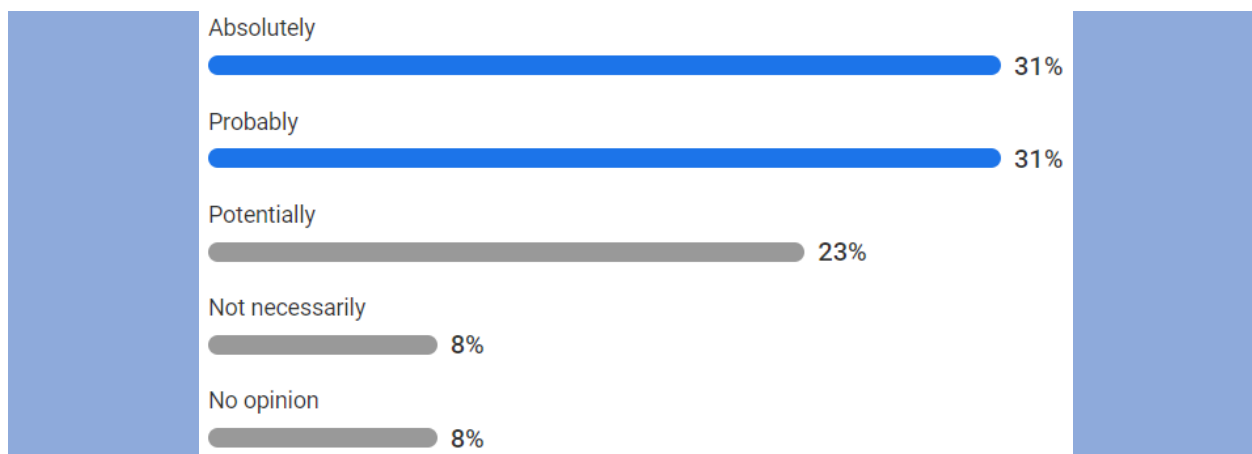


##### Remarks and recommendations:

- It is very important to give priority to existing institutions and geographical communities, networks of institutions, etc. In this perspective, it is more effective to use existing networks than to create new ones.
- It is not easy to mobilise political actors. Need to develop strategies to reach them. Many projects have very good outputs and dissemination is a question of strategy and marketing.
- It is essential to better involve National Coordinators and National Contact Points (NCPs) in order to reach policy makers.
- Importance of associated partners (AP) and need to have closer contact with them (to "activate" these partners). Do more than just invite these partners to events. Associated partners from the South should also have a greater place in the programme (think more about how to involve them)
- Explore the possibility of asking associated partners to sign a memorandum of understanding with the projects
- The list of associated partners should be evolving with the possibility of selecting and integrating new institutions during the programming period; a budget is also needed to better collaborate with these partners (travel expenses, events...) (see how the modular projects could cover these costs).
- The mobilisation of associated partners raises a question about public procurement. It is possible to pay for travel expenses but it is more problematic to pay for services. This needs to be checked at programme level to provide clear guidelines.
- In this context, how can the private sector be taken into account as an associated partner?

**5. Should differentiated support (technical and financial) be provided according to the complexity of the transfer/mainstreaming process?**

**Participants' responses:**



**Remarks and recommendations:**

- A differentiation of the types of support would depend on the type of output concerned. An ad hoc process should be prepared for this.
- On some issues, when it comes to influencing key decision-makers, this should be done not only at the level of the regions, but also at ministerial level; the differences in competences between administrative levels need to be taken into account to ensure good coherence and efficiency of the processes.
- It is recalled that sometimes partners located in capital cities outside the MED area (Spain, France...) must be involved for greater efficiency. How to proceed?

## 4. Elements of conclusion

The two approaches to support the mainstreaming activities of WP 9 PANORAMED have allowed to draw some general conclusions on this process in the context of the Interreg MED 2014-2020 programme.

The transfer of Interreg outputs and results to decision-making bodies at local, regional or national level has taken place over several generations of programmes in a rather spontaneous way among certain projects and actors.

In this context, WP 9 PANORAMED has tried to identify good mainstreaming practices and to highlight them. In addition to the supporting approaches and tools, WP 9 also developed a series of actions to interview the different stakeholders (Horizontal and Strategic projects on the one hand, and a selection of national and regional actors on the other hand) on the difficulties encountered and the needs in the implementation of mainstreaming approaches. The support of WP9, but also all the practices and experiences observed, allowed to define in broad terms the steps, actors, methodological tools and resources needed for mainstreaming.

The active involvement of the Interreg Med Horizontal and Strategic projects, as well as the regional and national actors who participated in the WP 9 actions, was a key element in the progress of the process. Their good practices, but also the sharing of their questions and challenges have allowed the definition and the improvement of the whole process.

This work of WP 9 has made it possible to define the contours of a specific mainstreaming process which can be further highlighted during the period 2021-2027 and inspire cooperation actions and projects. A reinforced mainstreaming will contribute to an increased visibility of Interreg within the Cohesion Policy, and to make the capitalisation even more concrete on the basis of operational and more effective contributions to public policies.

For the future, the practice and experience of Strategic and Horizontal projects indicates what steps would be needed to strengthen the mainstreaming process. These steps could go in two directions:

- Bottom up: the procedures to be followed by modular projects with regard to mainstreaming would be more binding. Their contribution would imply that they are more involved in mainstreaming processes from the start of their activities (e.g. specified in the terms of reference of calls for projects)
- Top-down: Stronger support for mainstreaming activities in modular and governance projects would be needed. Top-down programme support could be provided through dedicated budgets, procedures and technical support, and above all by establishing effective links with high-level policy makers.

## 5. Annexes

### 5.1. Working documents

#### a. Checklist for the selection of relevant outputs

The purpose of this “checking list” is to help HPs and SPs identify relevant outputs, check whether these outputs meet basic criteria for a successful transfer process and take relevant measures to progress in that direction.

**Output 1:** .....

	Yes or No	Comment /
The output is well identified, concrete, operational (guideline, methodology, process, tool...)		
Documents, technical description, guidelines, tools are up to date, available and accessible		
The output corresponds to a concrete need/expectation at local, regional, national, transnational level		
The Giver is available and willing to be involved in the transfer of the output		
A potential Taker has already been identified for the output		

**Output 2:** .....

	Yes or No	Comment
The output is well identified, concrete, operational (guideline, methodology, process, tool...)		
Documents, technical description, guidelines, tools are up to date, available and accessible		
The output corresponds to a concrete need/expectation at local, regional, national, transnational level		
The Giver is available and willing to be involved in the transfer of the output		
A potential Taker has already been identified for the output		

***b. Template - Overview of the “Giver” side***

<b>Presentation of the partner</b>
<u>Name of the institution:</u>  <u>Main competences and responsibilities:</u>
<b>Analysis of the Project / output</b>
<b>Description of the project</b>
<u>Title:</u>  <u>Objectives:</u>  <u>Partners:</u>  <u>Context - Geographical scope:</u>
<b>Description of the output/result to be Mainstreamed / transferred</b>
<u>Title:</u>  <u>Objectives:</u>  <u>Context - Geographical scope:</u>  <u>Deliverables / operational results:</u>
<b>Concrete modalities for the conception/implementation of the output/results</b>
<u>Technical modalities (human resources...):</u>  <u>Governance modalities (involved stakeholders...):</u>  <u>Lessons learnt / vigilance points / difficulties:</u>
<b>Available resources for a mainstreaming / transfer process</b>
<u>Technical conditions (budget, human resources, involved stakeholders):</u>  <u>Available dissemination tools / technical document / media...:</u>
<b>Feedback about the Giver side and Output: Lessons learnt / difficulties and solutions</b>
...

### c. Template - Overview of the “Taker” side

<b>Presentation of the partner</b>
<u>Name of the institution:</u>  <u>Contact person:</u>  <u>Competences / responsibilities related to the mainstreaming process:</u>  How the taker has been identified and selected? (process, difficulties)
<b>Identification of needs</b>
<b>Main objectives and needs of the institution related to the outputs identified</b>
<b>Specific/operational contribution of the output to the objectives of the institution</b>
<b>Feedback about the Taker side: Lessons learnt / difficulties and solutions</b>

### d. Transfer plan

<b>Summary of the objectives of the transfer process</b>				
<b>STEP 1-</b>				
Task	Objectives	Concrete modalities for implementation	Responsible and involved stakeholders	Timeline
Task 1:				
Task 2:				
Task 3:				
<b>STEP 2-</b>				
Task	Objectives	Concrete modalities for implementation	Responsible and involved stakeholders	Timeline
Task 1:				

Task 2:				
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Timeline	

Feedback about the transfer process: Lessons learnt / difficulties and solutions

## 5.2. Factsheets

### a. **FACTSHEET 1: SELECTION OF RELEVANT OUTPUTS AND SECURING GIVERS' ENGAGEMENT**

#### Update as of:

- 30<sup>th</sup> April 2020
- 6<sup>th</sup> October 2020
- 15<sup>th</sup> June 2021
- 15<sup>th</sup> December 2021

#### Context:

Horizontal projects are expected to transfer or mainstream outputs coming from the modular projects involved in their thematic community.

Strategic projects are expected to transfer or mainstream their own outputs to the relevant level of policy-making (local, regional, national or EU level).

#### Challenges

- To select outputs that meet a minimum of quality criteria (concrete, operational, available, accessible...)
- To select outputs that can have a concrete impact on practices, activities, or public policies (not just recommendations or guidelines...)
- To select outputs that meet the “demand” and correspond to the expectations of potential Takers
- To make sure that the Givers are willing to get involved in the transfer process
- To select outputs that are transferable within the timeframe of the project (to be operational and realistic)

#### Structure of the factsheet:

This factsheet addresses three issues that should form the basis of a sound mainstreaming/transfer process:

- **Task 1:** Identification of relevant projects and outputs
- **Task 2:** Involvement of project partners (Givers)

For more details about the latest developments of Horizontal and Strategic Projects, see also the summary of the contributions of projects to the Focus Groups:

- [Focus Group 1](#) “Mobilisation of Stakeholders” – 4<sup>th</sup> November 2021
- [Focus Group 2](#) “How to better mainstream/transfer outputs” – 30<sup>th</sup> November 2021



## Task 1: Identification of relevant projects and outputs

### Context / feedback from the experimentation

- A large number of projects have been analysed during the experimentation (more than 100) and only a very limited number of outputs appeared to be relevant for a transfer process (outputs outdated, not enough operational, documents not available, givers not willing to contribute, etc.). It is then essential to be rigorous and realistic with the choice of outputs

What to do?	How to do it? <i>Recommendations from the experts + Practices and tips already experimented by HPs and SPs</i>
1. Establish a list (mapping) of available outputs	<p><b><u>GENERAL APPROACH</u></b></p> <ul style="list-style-type: none"> <li>- To go through modular projects or strategic projects, check the level of implementation of their work packages and activities (mapping of the outputs)</li> <li>- Drafting of catalogues of outputs, results, best practices, lessons learnt taken from modular projects; translation into several languages (HP Sustainable Tourism; Biodiversity, Efficient Buildings...)</li> </ul>
	<p><b><u>HP BIODIVERSITY</u></b></p> <p><b>Mediterranean Biodiversity Protection Catalogue</b></p> <p>A template with common sections to compile standardized tool profiles was sent to the MPs to elaborate the Catalogue of outputs following the same structure. Tools were classified in 3 types: monitoring, management and geospatial tools.</p> <p>This template has been updated to assess the replicability and transferability of the outputs.</p> <p>It will continue to be used and enriched with new tools during this current phase making use of the additional results from ongoing MPs.</p> <ul style="list-style-type: none"> <li>- <a href="#">Capitalisation strategy of the Mediterranean Biodiversity Protection Community</a></li> <li>- Mediterranean Biodiversity Protection Tools catalogue: <a href="#">EN</a>, <a href="#">FR</a>, <a href="#">AR</a></li> <li>- Mediterranean Biodiversity protection community outline (<a href="#">EN</a>)</li> </ul> <p><b>Setting up of thematic working groups</b></p> <p>Three working groups have been established to work closely with the MPs in different subtopics. Different activities are developed in these WGs: common community action plans, a monitoring strategy for MPs, webinars and trainings, contribution to reports and policy papers and to the organisation of events, etc.</p> <p>The proposed action plans for the three WGs were shared during a series of webinars that took place during the first semester of 2020. The APs will be published in September / October 2020.</p> <ul style="list-style-type: none"> <li>- Revamping the Mediterranean Biodiversity Community: <a href="https://www.youtube.com/watch?v=s8nfXS-bsOk">https://www.youtube.com/watch?v=s8nfXS-bsOk</a></li> <li>- WG1 Biodiversity protection and transboundary challenges: <a href="https://www.youtube.com/watch?v=uQSAKEJW6ol">https://www.youtube.com/watch?v=uQSAKEJW6ol</a></li> <li>- WG2 Sustainable use of natural resources: <a href="https://www.youtube.com/watch?v=IE4ipunZ-Pw">https://www.youtube.com/watch?v=IE4ipunZ-Pw</a></li> <li>- WG3 Integrated ecosystem monitoring and management:</li> </ul>

	<p style="text-align: right;"><a href="https://www.youtube.com/watch?v=WBR-jcvvTP8">https://www.youtube.com/watch?v=WBR-jcvvTP8</a></p> <ul style="list-style-type: none"> <li>- Setting up of an <a href="#">international Declaration</a> (involvement of associated partners and key stakeholders) + communication <a href="#">video</a></li> <li>- Bilateral meetings with stakeholders to encourage the collaboration (<i>contribution to the RAMSAR resolution</i>)</li> </ul> <p><b>Mediterranean Biodiversity Protection Knowledge Platform</b></p> <p>The platform has been created as the long-term online Capitalization tool of the MBPC. This tool gives access to main partners and results of MPs, their underlying spatial outcomes, if envisaged, together with metadata and information from different sources, existing databases and formats, as a repository and analytical tool for the community and the Interreg Med programme.</p> <p>The platform will be enhanced and updated with the new data produced and shared by the modular projects, as well as the materials developed by the MBPC project itself.</p> <p>The MBPKP also hosts the MedBioLitter thematic database on generating evidence related to interactions between biodiversity and marine litter. The approach consists of making science accessible to decision-making processes by synthesising knowledge from scientific articles on the impacts of litter on marine life and providing it as one-entry point to influence decision making processes. MedBioLitter is updated twice a year and regular reports are published building on this evidence-base. The latest being published in January 2020.</p> <p>Several training sessions will be organized in 2021 and 2022 on the use and functionalities of the platform.</p> <ul style="list-style-type: none"> <li>- Mediterranean Biodiversity Protection Knowledge Platform: <a href="http://panaceaweb.adabyron.uma.es/">http://panaceaweb.adabyron.uma.es/</a></li> <li>- MedBioLitter thematic database: <a href="https://panaceacatalogue.adabyron.uma.es/gvsigonline/core/public_project_load/marinelitter/">https://panaceacatalogue.adabyron.uma.es/gvsigonline/core/public_project_load/marinelitter/</a> <ul style="list-style-type: none"> <li>- Mediterranean Biodiversity and Marine Litter – Interaction knowledge base: <a href="https://spark.adobe.com/page/dQLZC7jbWrgPx/">https://spark.adobe.com/page/dQLZC7jbWrgPx/</a></li> </ul> </li> </ul> <p><b>Reports and advocacy documents</b></p> <p>Several reports and advocacy documents have been created in collaboration with the MPs related to their scope of work: Project Factsheets; Thematic Papers; Greening your event Guidelines (in collaboration with other HPs); Meetings and workshop reports.</p> <ul style="list-style-type: none"> <li>- <b>Publications PANACEA project:</b> <a href="https://biodiversity-protection.interreg-med.eu/knowledge-documentary-resources/publications-panacea-2016-2019/">https://biodiversity-protection.interreg-med.eu/knowledge-documentary-resources/publications-panacea-2016-2019/</a></li> </ul> <p><b>HP BLUE GROWTH</b></p> <p><b><u>Common format of “tool factsheet” for tools/results of Blue Growth modular and integrated projects</u></b></p> <p>This document has been filled by all Blue Growth projects (closed and ongoing) to collect all information needed to assess the respective transnational replicability and transferring potential of each tool (e.g. readiness, easiness to use, target end-users, prerequisite for implementation), but also to help the identification of specific targets (“receivers”).</p>
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	<p><b><u>Synthesis Table of tools</u></b></p> <p>Table already available in the BG community has been produced (Deliverable 5.2.2 - cf. Annex 2) based on Tool factsheets filled by BG projects. It gives an overview of main weaknesses and strengths of each tool, also highlighting the potential target “taker”.</p> <hr/> <p><b><u>HP EFFICIENT BUILDING</u></b></p> <p><b>An extensive study of Outcomes has been developed;</b> 10 Modular Projects and 34 outcomes were analysed – we also implemented a <a href="#">fourth phase methodology</a> to identify relevant outputs.</p> <ul style="list-style-type: none"> <li>- 1st Phase Base classification: the initial step classified the outcomes according to the type of resource, the scope and the target.</li> <li>- 2nd Phase Replicability: six different aspects were identified to analyse the replicability of the outcomes.</li> <li>- 3rd Phase Inter-variable classification: interweaved the relation between resources, target audience, availability, autonomy and maintenance</li> <li>- 4th Phase Developers’ engagement: 8 meetings with lead partners and developers were conducted to incorporate the feedback and knowledge of the producers’ and obtain detailed information about possible adaptations and requirements for final results.</li> </ul> <p>At this point we are evaluating which are the final outcomes to be transfer in each territory since most of them require adaptations, and in consequence budget (September 2020)</p> <p><b>Policy recommendations:</b> A set of policy recommendations from the EB Community has been prepared detail in <a href="#">“Policy recommendations strategy for a Mediterranean building renovation programme”</a>. It related the main recommendation and the Modular Projects which have addressed these topics. These recommendations address both European policy makers and national decision-makers.</p> <p>These recommendations took previous policy work into account, including:</p> <ul style="list-style-type: none"> <li>- Two policy papers produced by CMCC providing a detailed analysis (on financing, on awareness and capacity-building)</li> <li>- Takeaways from national policy debates carried out in 2019</li> </ul> <hr/> <p><b><u>HP GREEN GROWTH</u></b></p> <p>A survey was developed by the WP responsible for transferring and was sent out to all modular projects in the Green Growth community. The survey aims to map the available outputs that could be part of a transfer process as well as details and descriptions of them, such as which languages the results are available in, whom the results are addressed towards, how to use them, etc.</p> <ul style="list-style-type: none"> <li>- Mapping of regional and national policies related to green growth</li> <li>- <a href="#">Mapping of Modular Project’s transferable results</a></li> <li>- <a href="#">Mapping of Modular projects- Excel Tables</a></li> </ul> <p><b><u>Communication tools</u></b></p> <ul style="list-style-type: none"> <li>- Template email that aimed to present the activity clearly, but also highlighting the added value of participating in the activity for the potential taker</li> <li>- <a href="#">Catalogue of project’s results</a> in a homogenised lay out, clear structure and visuals</li> </ul>
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	<ul style="list-style-type: none"> <li>- <a href="#">Catalogue of project's actionable knowledge leaflet</a></li> </ul>
	<p><b>HP RENEWABLE ENERGY</b></p> <ul style="list-style-type: none"> <li>- Realisation and regular Updating of library/catalogues/knowledge platform of outputs characterised and organised by categories, conditions for replicability of outputs</li> <li>- Realisation of <b>tutorials</b> in local languages</li> <li>- Creation of a <b>handbook</b> in local languages</li> <li>- Calls to identify good practice in mainstreaming</li> </ul>
	<p><b>HP SOCIAL AND CREATIVE</b></p> <p>The Semantic Framework encompasses a number of <b>innovative tools for the textual analysis of documents coming from already funded project</b> descriptions, deliverables, and any other source containing useful information. More specifically, the <b>Smart Search and Discovery tools</b> allow a non-expert user – policy analyst, researcher or practitioner - to choose a library of documents to analyse (e.g. the full range of deliverables produced so far by the MED CSI projects) and then make semantic queries on that library to extract relevant knowledge for his/her tasks at hand. In addition to that, the user has the possibility to create a Cross-Correlation Matrix having on the rows and columns any number of concepts autonomously defined by the users. The contents of the cells can be extracted from the library of documents preselected by the user. In so doing, the knowledge contained therein can be successfully exploited.</p> <ul style="list-style-type: none"> <li>- <b>Smart search for MED projects results:</b> <a href="http://90.147.102.57:8080/SearchMetadata/">http://90.147.102.57:8080/SearchMetadata/</a></li> <li>- <b>E-Learning toolkit</b> (capitalisation of the results of modular projects): <a href="https://social-and-creative.interreg-med.eu/what-we-achieve/socialcreative-tools/">https://social-and-creative.interreg-med.eu/what-we-achieve/socialcreative-tools/</a></li> <li>- <b>Video tutorial of “smart search”</b> of Semantic Framework Tool (semantic search on multiple text collections &amp; automatic summarization of document's contents): <a href="http://90.147.102.57/benchmark/tutorial/pillar2.mp4">http://90.147.102.57/benchmark/tutorial/pillar2.mp4</a></li> <li>- <b>Video tutorial of “policy design variables”</b> of Semantic Framework Tool (cross-correlation matrix service to connect policy targets with MED projects features: <a href="http://90.147.102.57/benchmark/tutorial/pillar3.mp4">http://90.147.102.57/benchmark/tutorial/pillar3.mp4</a></li> </ul> <p>Implementation and regular updating of a <b>knowledge platform</b>, e-learning toolkit, a <b>web space which collects and presents the relevant tools/ outcomes developed by the 11 Modular Projects</b> promoting the reuse of results of the Projects in the CSI Community by providing easy access to their outputs in the forms of “<b>tools for policy making</b>”, tailored on the profile and role played by each user looking for them.</p> <ul style="list-style-type: none"> <li>- <a href="https://social-and-creative.interreg-med.eu/what-we-achieve/socialcreative-yearbooks/">https://social-and-creative.interreg-med.eu/what-we-achieve/socialcreative-yearbooks/</a></li> </ul>
	<p><b>HP SUSTAINABLE TOURISM</b></p> <ul style="list-style-type: none"> <li>- In order to build a strong relationship between the Horizontal Project (HP) and the Modular and Strategic Projects (givers), ST project has created the role of <b>Horizontal Angel</b>, which is a partner of the HP in charge of monitoring and supporting several MPs/SPs of the Community. Horizontal Angels (the distribution of MPs/SPs among project partners will be sent in attachment) participate to the events of their MPs/SPs, without stepping into their own activities and tasks, and keep a silent -yet</li> </ul>

	<p>active- role in the MPs/SPs' lifetime. A calendar of monitoring meetings between each Angel and its MPs/SPs has been foreseen in order to follow up thoroughly the results and achievements of each project (template for the monitoring meetings will be sent in attachment). The results of these meetings lead to a global monitoring report produced by the leader of WP4 Transferring. So far, we have completed the first monitoring process (new projects) and are about to start the second one (completed and ongoing projects).</p> <ul style="list-style-type: none"> <li>- With the aim of formalising the commitment of the projects in the activities of the Community and ensure their engagement as givers of Community's outputs, a <b>Memorandum of Understanding</b> has been signed between HP and MPs/SPs. An example of MoU will be sent in attachment.</li> <li>- Two <b>Community Building workshops</b> have been foreseen as well, to integrate all the Community's results towards an effective transferring and capitalisation process: the HP, with the help of the projects' representatives, identifies the most important and tangible outputs which can be further transferred and adopted by other entities in the Mediterranean and beyond. The first Community Building Workshop has been held in March 2020, in Salou. The second one is foreseen as a side event of the mid-term event of the project.</li> <li>- As a baseline tool for the transferring and capitalisation activities, a <b>Catalogue</b> collecting <b>41 project outputs</b> from the first 14 projects will be published soon. The catalogue will include information not only per project but also per output/tool produced by each project with an emphasis on policy targets, implementation areas, replicability conditions etc. An example of Catalogue output fact sheet will be sent in attachment. <ul style="list-style-type: none"> <li>- Horizontal Angels (monitoring reports: <a href="#">Closed Projects</a>; <a href="#">Interim Projects</a>; <a href="#">New Projects</a>)</li> <li>- Memorandum of Understanding HPs/SPs (<a href="#">template</a>)</li> <li>- Community Building workshops</li> <li>- Catalogue (<a href="#">example</a>)</li> </ul> </li> </ul>
<p><b>2. Select the most relevant outputs for the mainstreaming process</b></p>	<p><b><u>GENERAL APPROACH</u></b></p> <ul style="list-style-type: none"> <li>- Evaluation of the relevance and transferability of the outputs by HPS and SPs following a common template (see annexe 1 of Factsheet 4)</li> <li>- Conference call between partners to share comments and develop common knowledge of existing online and offline outputs</li> <li>- Feedback from stakeholders or thematic experts on the selected main outputs to be mainstreamed: what are the outputs with most potential?</li> <li>- Classification of projects/outputs/results according to different criteria, which measures their mainstreaming potential (Social and creative, Efficient Buildings)</li> <li>- To implement pilot projects to test tools, methodologies and identify their transferring and replication opportunities (Best Med, Smart Med, B-Blue, Blue Bio MEd)</li> </ul> <p><b><u>TIPS</u></b></p> <ul style="list-style-type: none"> <li>- If possible secure upstream the minimum availability/capacity of the Giver (modular project, project partner) to engage in the transfer process (see Task 2)</li> </ul>

	<p><b><u>SP BEST MED</u></b></p> <p>Based on the approach defined in the AF, the <b>BEST Sustainable Path and Cultural Routes Model (MED S&amp;C Path)</b> appears as the main relevant output to be <b>transferred/mainstreamed</b> to the policy-making level. This output should help policymakers to make more informed decisions and have a concrete impact on practices and public policies.</p> <ul style="list-style-type: none"> <li>- The Model will lead to a new integrated and sustainable touristic planning in the MED area, by proposing a joint approach on “green” planning, based on (and improving) the outputs produced by other projects such as relevant tourism data indicators (e.g. in MITOMED+, CO-EVOLVE among others) towards a wider model for routes linking coastal, maritime and inland destinations</li> </ul>
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## ***b. FACTSHEET 2: IDENTIFICATION AND MOBILISATION OF TAKERS***

### Update as of:

- 30<sup>th</sup> April 2020
- 6<sup>th</sup> October 2020
- 15<sup>th</sup> June 2021
- 15<sup>th</sup> December 2021

### Context:

A successful transfer or mainstreaming process requires a good matching between the “offer side” and the “demand side”. It is necessary to identify relevant outputs (Factsheet 1) but also to ensure that they correspond to the need of the “Takers” and that these Takers are available and willing to get involved in a transfer/mainstreaming process.

### Challenges:

- To identify relevant potential takers (what kind of institution? which institutional level? Which tools?)
- To inform potential takers and involve them in the transfer/mainstreaming process
- To ensure full and long-term involvement of stakeholders (for sustainability of mainstreaming)

### Structure of the factsheet:

This factsheet addresses three issues that should form the basis of a sound mainstreaming/transfer process:

- **Task 1:** Identification of relevant “Takers”
- **Task 2:** Mobilisation of relevant “Takers”

For more details about the latest developments of Horizontal and Strategic Projects, see also the summary of the contributions of projects to the Focus Groups:

- [Focus Group 1](#) “Mobilisation of Stakeholders” – 4<sup>th</sup> November 2021
- [Focus Group 2](#) “How to better mainstream/transfer outputs” – 30<sup>th</sup> November 2021

## Task 1: Identification of relevant “Takers”

### Context / feedback from the experimentation

- The identification of potential “Takers” depends on the types of outputs available but also on more operational aspects (availability, proximity...). The following points shall be considered to identify these relevant “Takers”
- The identification of the relevant person working at the Taker side is key for a successful transfer process. There are several features that can be helpful for mainstreaming:
  - the networking capacity: the good contact of the person to the various departments or services in the institution (for example, the service in charge of EU funding and the sectorial services in charge of a theme)
  - the availability in terms of time and resources to spend in the mainstreaming process
  - the continuity of the staff at the institution
  - Mapping of regional competences/stakeholders in the partners areas (National/regional levels) or beyond (Green Growth, Blue Bio Med, B-Blue)

What to do?	How to do it? <i>Recommendations from the experts + Practices and tips already experimented by HPs and SPs</i>
<b>1. Elaborate a list/mapping of potential Takers considering basic criteria:</b> what is the appropriate institutional level, thematic focus, geographic coverage, etc.?	<b><u>GENERAL APPROACH</u></b> <ul style="list-style-type: none"> <li>- To identify main key players in the field of intervention at local, regional, national and international level</li> <li>- To prepare the mapping of stakeholders, you can use “a stakeholders Power/Interest Matrix”, which can help you to prioritising the stakeholders that you could mobilise according their role/influence (interest /power);</li> <li>- Be realistic and identify bodies with whom a cooperation could be set up considering the context and constraints of the project (nature of outputs, timeline of the mainstreaming project...)</li> <li>- Monitoring Committees can play a strong role in mainstreaming activities with the identification and mobilisation of key players in relation with National Contact Points (NCPs) and national authorities.</li> </ul>
	<b><u>HP EFFICIENT BUILDING</u></b> <p>A detail analysis of PANORAMED <b>classification, previous involved stakeholders</b> and relevant actors was made to select the more relevant targets to transfer, capitalization and communication activities.</p> <p><b>Three aggrupation</b> were defined to accurately engage targets. A template was conformed with the initial contacts related to the different aggrupation.</p>
	<b><u>HP GREEN GROWTH</u></b> <p>One of the deliverables in the capitalisation WP constitutes a <b>mapping of policies on green growth and related topics at regional, national, Mediterranean and EU level</b>. This mapping will assist in the identification of takers, as it provides an overview of policy priorities in the green growth area, especially at regional and national level, and provides an indication to where, in the current policy landscape at all the above-mentioned levels, there potentially could be opportunities for the project to influence.</p> <ul style="list-style-type: none"> <li>- <b>Policy Mapping</b></li> </ul>



	<p><b>HP URBAN TRANSPORTS</b></p> <ul style="list-style-type: none"> <li>- Calls to identify takers</li> </ul>
<p><b>2. Mobilise the closest circle:</b></p> <ul style="list-style-type: none"> <li>- ETC Projects partners</li> <li>- Modular projects' own networks/partners</li> <li>- Institutions involved in thematic communities</li> <li>- Associated partners of PANORAMED (including relevant NCPs)</li> </ul>	<p><b>GENERAL APPROACH</b></p> <ul style="list-style-type: none"> <li>- Establish a mapping of your partners external partners, or network, identify their needs and check among them which ones could be potential Taker</li> <li>- Ask partners to define a list of potential Takers through the strategic working groups</li> <li>- Use Horizontal angels and Territorial antennas to identify potential Takers</li> <li>- When possible, look for Takers that are familiar with INTERREG projects, as it will allow them to better understand the process</li> </ul> <p><b>TIPS:</b></p> <ul style="list-style-type: none"> <li>- Use a survey to identify the needs of these partners</li> <li>- Organisation of a webinar gathering all the modular projects to seek their involvement</li> </ul>
	<p><b>SP BEST MED</b></p> <p>A <b>sustainable tourism observatory</b> - Best MED cultural platform is being set up. The takers, such as cultural groups, are identified via this platform.</p> <p>The starting point was a technical seminar organised by Lazio Region paving the way for the creation of a network. Other events and actions to mobilise stakeholders have been organised:</p> <ul style="list-style-type: none"> <li>- <b>Policy learning seminars:</b> presentation at local level, and important to engage local and regional actors ; it was quite successful (69 participants in all countries)</li> <li>- <b>Living labs</b> with local development association – hybrid mode – very useful too (53 participants)</li> <li>- <b>Focus group</b> with all relevant stakeholders – lead partner organised a webinar on the cultural platform (58 participants)</li> </ul>
	<p><b>HP BLUE GROWTH</b></p> <p><b>Blue Growth Advisory Board online event (27th July 2020)</b></p> <p>The event was organized to present the main tools/outputs of the BGC's 5 more mature MPs. After each presentation, questions were posed to the attending participants about each tool/output, which were mainly answered in real time through the chat by the participants. The questions were about the potential "use" of each tool and were posed to identify potential receivers/takers among the BGC's main stakeholders.</p> <ul style="list-style-type: none"> <li>- Short description of the meeting: <a href="https://blue-growth.interreg-med.eu/news-events/news/detail/actualites/2nd-advisory-board-of-the-blue-growth-community-27th-of-july-2020/">https://blue-growth.interreg-med.eu/news-events/news/detail/actualites/2nd-advisory-board-of-the-blue-growth-community-27th-of-july-2020/</a></li> <li>- Presentation of the outputs: <a href="https://blue-growth.interreg-med.eu/press-room/events-presentations/">https://blue-growth.interreg-med.eu/press-room/events-presentations/</a></li> <li>- Answers of the participants:</li> </ul> <p><b>Targeting meetings with potential takers (Maritime Clusters)</b></p> <p>E.g. BIG and Andalusian Maritime cluster / identified during the 1st phase of the project (IBG project). During the BG kick-off meeting in Montpellier in February, <b>a number of maritime clusters (Associated partners of the BG HP) have been invited</b> to participate. Among them 2 clusters have decided to collaborate among them and adopt some of the presented outputs. A bilateral</p>

	<p>meeting has taken place in Rome between the 2 clusters and the BG thematic community LP for defining a customized transferring roadmap.</p> <p>Meeting with Maritime clusters:</p> <p><a href="https://www.facebook.com/BlueGrowthCom/posts/2795106363845960">https://www.facebook.com/BlueGrowthCom/posts/2795106363845960</a></p>
	<p><b><u>HP RENEWABLE ENERGY</u></b></p> <ul style="list-style-type: none"> <li>- <b>5 regional groups</b> were launched in order to bring together the target groups. The associated partners were closely involved, they also facilitated some sessions – low process of engagement – training programme. When addressing the target groups, it is recommended to focus on actions rather than structures to attract their attention. The project language also needs to be adapted to the target groups so that they take the tool.</li> </ul>
	<p><b><u>HP SUSTAINABLE TOURISM</u></b></p> <ul style="list-style-type: none"> <li>- Organisation of community building workshops</li> <li>- To mobilise Antennas to reach stakeholders (mapping, action plans, meeting...)</li> </ul>
<b>3. Select potential Takers according to the mainstreaming objectives</b>	<p><b><u>GENERAL APPROACH</u></b></p> <ul style="list-style-type: none"> <li>- Potential takers must fit with the “implementation level” of your output(s). Be focused on institutions directly concerned by this output (local, regional, national level?)</li> <li>- For mainstreaming, select “Takers” that have a strong enough legislative power</li> <li>- Have a clear and realistic plan of whom to target when it comes to potential Takers (Green Growth Community)</li> <li>- Draft tables of policy targets aligned with the projects deliverables and thematic groups objectives (Biodiversity Community)</li> <li>- Analyse target groups, categorise them in terms of their role in the project, exchange between partners to share ideas (Med Cities)</li> </ul>
	<p><b><u>SP SHAREMED</u></b></p> <ul style="list-style-type: none"> <li>- Setting up stakeholder groups who need solutions; to gather groups of scientists with regional institutions</li> <li>- <b>Transnational on Demand Access Action Call.</b> This activity consists of the pairing of donor institutions with recipients in the Mediterranean countries, to undertake some practical hands-on doable actions offered by the donor to be chosen on-demand for execution with the recipients and at the recipient sites.</li> <li>- <a href="http://ioi.research.um.edu.mt/sharemed-on-demand/">http://ioi.research.um.edu.mt/sharemed-on-demand/</a></li> <li>-</li> </ul>
	<p><b><u>HP BIODIVERSITY</u></b></p> <p><b>Mapping of policies and actors</b></p> <p>The Mediterranean Biodiversity Protection Community project strives to establish a <b>direct dialogue with relevant policy and management stakeholders</b> to highlight the need for science-based management practices to preserve and nourish biodiversity resources and sustain the multiple services that healthy and ecologically functioning ecosystems provide us with.</p> <p>That is why <b>the MBPC has identified target groups and policies</b> to reach during the lifetime of the project establishing also the link with each working group.</p>

	- <a href="#">The Mediterranean Biodiversity Community Outline</a>
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## Task 2: Mobilisation of relevant “Takers”

### Context / feedback from the experimentation

Takers are not all aware of INTERREG programmes and are not familiar about mainstreaming or transfer process. They will accept to be involved only if they perceive that there is a clear added value for them in a win-win approach. In order to have them fully involved in the process, the following points can be addressed:

- “Takers” will only get involved if they have an interest to do so. Your output must fit with their needs, strategy, agenda... The output must be concrete and operational
- The information provided to the potential “Takers” is really strategic to convince them to integrate the mainstreaming process (information on the added value of mainstreaming AND detailed information about the output)
- The involvement of a “Taker” often requires a longer period of time than for other more usual activities. It is also necessary to be proactive and perseverant. Bilateral work with the taker may be needed
- The involvement of ‘givers’ is not always granted, as some projects are closed and have no available funding, or they do not see the interest in being involved in the mainstreaming process.
- Advocacy and Lobbying is necessary to reach key institutional players and promote for example the implementation of Conventions, agreements...

What to do?	How to do it? <i>Recommendations from the experts + Practices and tips already experimented by HPs and SPs</i>
1. Reflect upon the best channels to contact potential Takers in a timely manner	<b><u>GENERAL APPROACH</u></b> <ul style="list-style-type: none"> <li>- It is easier to inform and mobilise “Takers” upstream. If your output is not achieved yet, use this opportunity to inform them and get them on board.</li> <li>- Use programme and project events to communicate about the project, its outputs and contact potential Takers</li> <li>- Use mainstreaming events to address decision makers and institutional bodies: national and regional debates, Capitalisation seminar in Brussels and MED events</li> </ul>
	<b><u>SP BEST MED</u></b> <p>Potential takers will be informed and involved in the transfer/mainstreaming process through the various <b>engagement meetings and events</b> planned in particular under WP5 &amp; WP6. The mobilisation of the selected takers will be ensured by the networking and advocacy potential of the most strategic partners.</p>
	<b><u>HP BIODIVERSITY</u></b> <p><b>External capitalisation events</b></p> <ul style="list-style-type: none"> <li>- EU Green Week, (webinar 22 October 2020)</li> <li>- Marine Protected Areas Forum, 2021</li> <li>- IUCN World Conservation Congress, January 2021: <a href="https://www.iucncongress2020.org/programme/official-programme/session-43253">https://www.iucncongress2020.org/programme/official-programme/session-43253</a></li> <li>- Barcelona Convention COP 22, December 2021</li> </ul>

	<p>In all these events Mediterranean Biodiversity Protection Community (MBPC) counts on the collaboration of the MPs and members of the Advisory Board to integrate achievements.</p> <p>Due to the current COVID19 situation, some planned activities (events, training, etc.) might become online activities. If so, the MBPC project will consider innovative ways of capitalizing this material and knowledge.</p> <hr/> <p><b><u>HP SUSTAINABLE TOURISM</u></b></p> <p>The role of <b>Territorial Antenna</b> is a key element introduced by the Sustainable Tourism project for the identification and engagement of relevant takers. The task of each Antenna consists on covering one territory (= MED Country) building the link with key actors of the territory it is responsible for and ensuring a fluid closer dialogue that will optimise a capitalisation responsive environment.</p> <p>Each Territorial Antenna is in charge of <b>mapping</b> its own territory to identify strategical actors (policy decision makers, network associations and catalysers, research and academics, etc.) checking their needs against Community's products (outputs) and engaging them in order to leverage policy change. The mapping is done at three levels of policies: tourism policies (at European, national, regional and local level), cohesion policies and Mediterranean policies.</p> <p>Another relevant role is the one of <b>Ambassador</b>, institutions or persons somehow connected with the community (MP project partners, associated partners, speakers in STC events, etc.) who have the task of facilitating the communication between the Community and the target areas. The Ambassador of a territory is selected by the Antenna responsible of that territory, considering criteria such as their previous involvement in the activities of the ST Community, their knowledge of the output to be transferred and their strong link with the territory.</p> <p>Once the Ambassadors and the stakeholders of each territory defined, Antennas elaborate on which outputs can be transferred easier, according to the study of the regions' challenges which will lead to the selection of the most relevant outputs.</p> <ul style="list-style-type: none"> <li>- <b>Territorial Antenna</b> (mapping of actors and <a href="#">action plans</a>)</li> <li>- <b>Ambassadors</b> (facilitating the communication between the Community and the target areas)</li> </ul>
<p><b>2. Convince potential Takers to integrate the mainstreaming process by providing them relevant information</b></p> <p><i>"Takers" have their own constraints. They will accept to be involved in a mainstreaming/transfer process only if there is a clear interest and added value for them</i></p>	<p><b><u>GENERAL APPROACH</u></b></p> <ul style="list-style-type: none"> <li>- When you have a list of potential "Takers", contact them and present your work. Provide a summary presentation of your output in an operational way. If the "taker" is interested, organise a physical meeting</li> <li>- The demand-driven approach is crucial. Awakening the interest of the takers is the way to involve them.</li> <li>- Communication is key. It is necessary to use plain communicative language when presenting your output to the "Taker". Elaborate a tailor-made communication plan focused on the dimensions which can be potentially re-used.</li> <li>- It is helpful for mainstreaming purposes to understand the administrative context of the Taker (if there are processes that take long, if consultations need to be made), and even the language of the Taker is important (not everyone at the Takers probably speaks English)</li> <li>- A mainstreaming/transfer process is an operational process. To have the agreement of an institution is not enough. It is necessary to work closely with people who will be concretely in charge of the process (see Factsheet 3). Organise</li> </ul>

	collective information meetings with different potential Takers <ul style="list-style-type: none"> <li>- Capacity building could be offered to institutional partners to allow for mainstreaming</li> </ul>
	<b><u>SP SMARTMED</u></b> <p>Following operational tools will be developed:</p> <ul style="list-style-type: none"> <li>- <b>Guidance for stakeholder empowerment events</b> – where indicative categories of stakeholders and a common format for empowerment events will be developed</li> <li>- <b>Matrix for the Business Model</b> – matrix template which will, among other things, identify stakeholder and partnership arrangements for implementation</li> <li>- <b>Stakeholders' matrix</b> - matrix template which identifies stakeholders, their interests, roles and responsibilities, problems and potentials as well as how to address their needs within the projects and SMART tourism business model</li> <li>- <b>Empowerment events</b> - with regional/local stakeholders will be held in the partner territories to discuss the key areas for the development of MED tourism competitiveness and innovation</li> <li>- <b>Regional/local stakeholder networks identified</b> – a standardised database matrix of the regional/local cross-sectoral public and private stakeholders for each partner area, including their needs, aspirations and potential role in the concept implementation.</li> <li>- Furthermore, potential takers will be informed and involved in the transfer/mainstreaming process through the <b>various engagement meetings and events</b> planned in particular under WP5 &amp; WP6. The mobilisation of the selected takers will be ensured by the networking and advocacy potential of the most strategic partners.</li> </ul>
	<b><u>HP BLUE GROWTH</u></b> <ul style="list-style-type: none"> <li>- Organisation of bilateral meetings between projects and regional authorities (by country)</li> </ul>
	<b><u>HP GREEN GROWTH</u></b> <ul style="list-style-type: none"> <li>- Organisation of a mainstreaming webinar to identify potential “takers”</li> <li>- Organisation of bilateral meetings with potential takers</li> </ul> <p>Participation and contribution in national and European working groups: participation in the ministerial declaration of the Union for the Mediterranean and in the European circular economy stakeholder's platform</p>
	<b><u>HP EFFICIENT BUILDINGS</u></b> <ul style="list-style-type: none"> <li>- <b>5 efficient building labs</b> were launched to introduce the different available resources from the community, and according to the stakeholders needs train local technician in specific outcomes and implement the resources in real work environments. 6 phases: connect the stakeholders; educate and train in available tools; implement (motivate stakeholders to implement and test solutions), improve; evaluate; disseminate.</li> <li>- <b>5 capacity building workshops</b>, for transferring and replicating a successfully implemented tool</li> <li>- <b>6 City-Twinning Partnerships</b> between MED governments and the South bank of the Med. This twinning programme that will last until mid-2022, municipal representatives will gain technical and process-related skills that will help them develop, fine-tune and implement successful measures in the field of efficient buildings. Twinning cities already identified.</li> </ul>

	<ul style="list-style-type: none"> <li>- The <b>capacity building workshops (CBW)</b> will be conducted in parallel of the annual meeting. Policy sessions and debates conducted during the mornings and the CBW in the afternoons.</li> </ul> <p><b><u>HP SOCIAL AND CREATIVE</u></b></p> <p>Identification and engagement of taker with the “<b>Bari Declaration</b>”. The declaration aims to create a Transnational Mediterranean Cluster devoted to Creativity and Social Innovation, involving SMEs, public authorities, business support organisations, sectoral agencies, research &amp; education entities, creatives and social innovators, civil society. This Cluster we propose to make permanent aims to promote sustainable growth in the Mediterranean area by fostering innovative concepts and practices (technologies, governance, innovative services...), reasonable use of resources (energy, water, maritime resources...) and supporting social integration through integrated and territorially based cooperation approach.</p> <ul style="list-style-type: none"> <li>- <b>Bari Declaration:</b> <a href="http://chng.it/9kyJQTqbpG">http://chng.it/9kyJQTqbpG</a></li> <li>- “<b>Join our Community</b>”: <a href="https://social-and-creative.interreg-med.eu/join-our-community/">https://social-and-creative.interreg-med.eu/join-our-community/</a></li> </ul> <p>The <b>Thematic Mapping Tool</b>, an online map created to provide information and explore specific features of 11 Modular Projects in the Social and Creative community where searchable map presents geographical distribution of S&amp;C modular Interreg MED projects, the consortia and the associated partners, the stakeholders and project beneficiaries, thus providing detailed information about the activities, budget, contact information and thematic areas.</p> <ul style="list-style-type: none"> <li>- <b>Thematic Mapping Tool:</b> <a href="http://thematicmapping.preda.rs.ba/">http://thematicmapping.preda.rs.ba/</a></li> <li>- “<b>What we achieved</b>”: <a href="https://social-and-creative.interreg-med.eu/what-we-achieve/socialcreative-tools/">https://social-and-creative.interreg-med.eu/what-we-achieve/socialcreative-tools/</a></li> <li>- <b>Innovation camp sessions</b> were organised. Local authorities were the most interested and active, and a communication campaign with the media was developed in parallel</li> </ul> <p><b><u>HP RENEWABLE ENERGY</u></b></p> <ul style="list-style-type: none"> <li>- A <b>call for proposals</b> was launched to identify flagship cases. <b>Training via tutorials</b> was organised to try to convince takers to use the tool, not to present the project.</li> <li>- Tutorials, the handbook and coaching sessions were available <b>in different languages</b>.</li> </ul>
<p><b>3. Reflect about the most appropriate way to keep takers involved in the mainstreaming process</b></p>	<p><b><u>GENERAL APPROACH</u></b></p> <ul style="list-style-type: none"> <li>- A variety approaches to involve takers may be needed according to the target groups, as the sense of ownership differs among them.</li> <li>- Close personalised monitoring of the mainstreaming process may be necessary in some cases. Continuous helpdesk service may be needed to support the mainstreaming process</li> <li>- A combination of different approaches (bilateral monitoring and open events) may be needed. Special attention needs to be paid to different governance levels. The local level is usually easier to reach, whereas the regional and international levels may need different types of actions to involve them</li> <li>- The use of local and regional networks can be useful to involve takers</li> <li>- Networking institutions (CPMR, ERRIN, European Network of living Labs, etc)</li> </ul>

	<p>can help mobilise stakeholders</p> <ul style="list-style-type: none"> <li>- Reaching non-Interreg stakeholders is needed also to ensure the sustainability of mainstreaming</li> <li>- Stakeholders in the same region may facilitate the process, as they speak the same language</li> </ul>
	<p><b><u>SP BLUEBIOMED</u></b></p> <ul style="list-style-type: none"> <li>- A <b>Sounding board</b> was created to facilitate -among other, the uptake of relevant project outcomes and the involvement of high-level institutions.</li> </ul>
	<p><b><u>HP GREEN GROWTH</u></b></p> <p><b>Bilateral meetings and follow-up sessions</b> have been foreseen to facilitate the matching between givers and takers.</p> <ul style="list-style-type: none"> <li>- If stakeholders on both sides belong to the same region, the transfer process seems easier as they share the language and the context.</li> </ul>
	<p><b><u>HP URBAN TRANSPORT</u></b></p> <p>Key success factors were:</p> <ul style="list-style-type: none"> <li>- <b>close and targeted support to learner / taker</b> – importance of bilateral animation process. It has proved more effective than wider communication campaigns. It was done for the Urban Transports call for replicators (takers) of some of the tools and knowledge that were developed previously;</li> <li>- <b>flexibility with the giver</b> involvement and find alternatives</li> <li>- <b>Helpdesk service</b> to support and ensure quality applicants to the call</li> <li>- The Urban Transports <b>call for mentoring</b> wanted to identify public entities willing to not only learn from others but actually replicate and implement concrete solutions. The focus was about takers of good practices, not of key policy messages for instance. A public call was launched with a useful helpdesk service where the organisation of bilateral meetings with potential applicants to accompany them. This was crucial to have at the end motivated entities willing to engage (the funding covered the expert support but not their staff time).</li> </ul>
<p><b>4. Work with the givers, as they have a crucial role in providing and explaining the output</b></p>	<ul style="list-style-type: none"> <li>- Givers (modular projects) need to feel part of the process and the community, and share the outputs as a natural step. Some projects may have closed or may not see the interest in the process.</li> <li>- Be flexible with the givers and try to find alternatives if the project is closed</li> <li>- Cooperation and collaboration among projects is needed, as the environment is very competitive</li> </ul>



### **c. FACTSHEET 3: MAINSTREAMING/TRANSFER PROCESS**

#### Update as of:

- 30<sup>th</sup> April 2020
- 6<sup>th</sup> October 2020
- 15<sup>th</sup> June 2021
- 15<sup>th</sup> December 2021

#### **Context**

The mainstreaming process consists of using the results of ETC projects to improve “mainstream policies” at regional and national level.

It also includes the transfer to local, regional, national or international (EU) institutions of ETC projects results in order to improve their practices, functioning, operational capacities, own policies, etc. (transfer process).

#### **Challenges:**

- To implement a process that is capable of generating concrete improvements and changes for the stakeholders involved (not just sharing of knowledge, information, best practice...)/transformation of public policies
- To get organised in order to be able to implement this process over a long run, as a mainstreaming or transfer process can require from a few months to several years
- To define indicators that can help monitor the process (see Factsheet 4 – Annexe 5)

#### **Structure of the factsheet:**

This factsheet addresses three issues that should form the basis of a sound mainstreaming/transfer process:

- **Task 1:** Connection between “givers” and “takers” and framework information
- **Task 2:** Drafting of the transfer plan
- **Task 3:** Implementation of the transfer plan
- **Transversal Task:** Coordination between project and communities

For more details about the latest developments of Horizontal and Strategic Projects, see also the summary of the contributions of projects to the Focus Groups:

- [Focus Group 1](#) “Mobilisation of Stakeholders” – 4<sup>th</sup> November 2021
- [Focus Group 2](#) “How to better mainstream/transfer outputs” – 30<sup>th</sup> November 2021



## Task 1: Connection between “givers” and “takers” and framework information

### Context / feedback from the experimentation

When outputs’ owners, namely Givers, and potential Takers are identified (see Factsheets 1 and 2), organise ideally a physical meeting to present the process and start exchanges.

In the mainstreaming process, the first meeting between Givers and Takers is a key moment to exchange information and start the collaboration. However, external experts had to intervene regularly to animate and stimulate the process. In the absence of external experts, Givers must play a stronger role.

It is important during this first exchange to identify the persons that will be concretely in charge of the implementation of the process on both sides (Giver and Taker) and able to change the policy from the “Taker” side.

What to do?	How to do it? <i>Recommendations from the experts + Practices and tips already experimented by HPs and SPs</i>
<b>1. Organise the meeting between “Givers” and “Takers”</b>	<p><b><u>GENERAL APPROACH</u></b></p> <ul style="list-style-type: none"> <li>- To define a programme for the first meeting, whose content could be:</li> <li>- Presentation of the objectives and mains steps of a mainstreaming process</li> <li>- Detailed presentation of the output(s) and of the methodology</li> <li>- Discussion about the needs of the “Taker” and the way the outputs can contribute to fulfil these needs</li> <li>- First exchange about the activities to be implemented for the mainstreaming/transfer process (preparation of the “transfer plan” (see next box) and the distribution of roles</li> <li>- Communication tools and arguments must be prepared to catch the attention of the potential takers (detailed presentation of the tool/outputs, added value for them to take part to the process...):</li> <li>- A tailor-made communication adapted to the audience</li> <li>- A web space was useful for collecting and presenting the relevant tools developed by the Modular Projects to promote the reuse of results of the Projects in the Community, by providing easy access to their outputs in the forms of “<b>tools for policy making</b>” (Social and Creative Community)</li> <li>- Involvement of the “Givers” in the discussion to eventually adjust their products to the Takers real needs and to support the transferring and mainstreaming process</li> <li>- Mainstreaming or transfer processes are long term and demanding activities. It is essential that the people in charge are well identified and have appropriate time and resources to accomplish their tasks (on the side of the “Giver” and the “Taker”)</li> </ul>
	<p><b><u>SP BEST MED</u></b></p> <p>The organisation of <b>collective information meetings among givers and takers</b> will be an important tool for the operation transfer. This should be supported by a <b>strong tailored-made communication campaign</b>, involving in particular strategic partners that can present the added value of the output to be transferred. In this sense, MOUs are foreseen.</p>

	<p><b>SP SMARTMED</b></p> <p>The organisation of collective information meetings among givers and takers will be an important tool for the operation transfer. This should be supported by a <b>strong tailored-made communication campaign</b>, involving in particular strategic partners that can present the added value of the output to be transferred.</p>
	<p><b>HP EFFICIENT BUILDING</b></p> <p><b>Exchange of information:</b> A call to Join the North-South MED exchange &amp; replication programme:</p> <ul style="list-style-type: none"> <li>- North Shore: <a href="https://efficient-buildings.interreg-med.eu/index.php?id=12956&amp;no_cache=1">https://efficient-buildings.interreg-med.eu/index.php?id=12956&amp;no_cache=1</a></li> <li>- South Shore: <a href="https://efficient-buildings.interreg-med.eu/index.php?id=12957&amp;no_cache=1">https://efficient-buildings.interreg-med.eu/index.php?id=12957&amp;no_cache=1</a></li> </ul> <p>The call intends to scout for entities from the north and south shore to establish six city twinning partnerships between the north side and the south Mediterranean shore to conduct capitalization activities.</p>
	<p><b>HP SOCIAL AND CREATIVE</b></p> <p><b>“Transferring working groups local/regional/MED”</b> consisting in the organisation and coordination of work within the virtual working groups between Givers and Takers</p>
<p><b>Operational tools available:</b></p> <ul style="list-style-type: none"> <li>- Identification of the Giver and the contact person in charge (see annex 2 Factsheet 4)</li> <li>- Identification of the Taker and the contact person in charge (see annex 3 Factsheet 4)</li> </ul>	

Task 2: Drafting of the transfer plan	
<b>Context / feedback from the experimentation</b>	
<p>The objective of the transfer plan is to specify in a detailed way how the mainstreaming or transfer activities will be implemented.</p> <p>At the start of the process, stakeholders (external experts, Givers and Takers) defined indeed their working programme and main activities. However, transfer plans had to be adapted regularly to take into account changing context and constraints (administrative issues, political agenda, health emergency with Covid19 ...).</p>	
What to do?	How to do it? <i>Recommendations from the experts + Practices and tips already experimented by HPs and SPs</i>
<b>2. Prepare the transfer</b>	<p><b>GENERAL APPROACH</b></p> <ul style="list-style-type: none"> <li>- To think about the transferring modalities: definition of a set of transferring modalities and evaluation of the best way to transfer each produced tools and input, also in function of the Takers of each tool (<u>Renewable Energy Community</u>)</li> <li>- To create the governance among stakeholders, such as the setting-up of an Advisory board and thematic working groups (<u>Blue Growth Community</u>)</li> <li>- To co-elaborate a detailed transfer plan at the start of the process with objectives, main activities, meetings, events and a detailed timeline for the implementation of steps and tasks.</li> </ul>

	<ul style="list-style-type: none"> <li>- This transfer plan should detail each step:</li> <li>- Drafting of preparatory documents needed for the transfer: information or technical documents, analyses, methodology</li> <li>- Organisation of working sessions between giver and taker</li> <li>- Communication activities to accompany the transfer process; dissemination of mainstreaming documents</li> <li>- Participation to events and seminars at EU, national, regional level...</li> </ul>
	<p><b><u>HP BLUE GROWTH</u></b></p> <p><b><u>Capitalisation strategy</u></b></p> <p>A Capitalization strategy was developed including transferring mainstreaming and advocacy activities. For the Blue Growth community, the capitalization activities should allow an effective transfer of mature tools/measure developed by our 11 Modular/Integrated projects and final uptake by local/regional policy makers (i.e. mainstreaming) to unlock the development potential of Blue economy sectors such as maritime surveillance, blue energies and to 'green' the yachting sector. These actions also keep contributing to the sustainable socio-economic development of the Med area through innovative investments in the Blue economy.</p> <p><b><u>Interaction plan</u></b></p> <p>As part of BLUE GROWTH COMMUNITY's (BGC) transferring activities (WP4), an interaction plan has been developed. The interaction plan provides detailed information about the working groups set-up and cooperation modalities among the members of the community and the Advisory Board, which include a series of intra-thematic community building activities, e.g. events, webinars, working group sessions, interactive virtual meetings and team exercises.</p>
	<p><b><u>HP BIODIVERSITY</u></b></p> <p><b>webinars</b></p> <p>During the webinars for revamping the Community and for each specific working group, the action plans were validated. Each webinar was also the occasion to confirm the commitment of the projects to the MBPC and to the different working groups.</p> <ul style="list-style-type: none"> <li>- Revamping the Mediterranean Biodiversity Community: <a href="https://www.youtube.com/watch?v=s8nfXS-bsOk">https://www.youtube.com/watch?v=s8nfXS-bsOk</a></li> <li>- WG1 Biodiversity protection and transboundary challenges: <a href="https://www.youtube.com/watch?v=uQSAKEJW6ol">https://www.youtube.com/watch?v=uQSAKEJW6ol</a></li> <li>- WG2 Sustainable use of natural resources: <a href="https://www.youtube.com/watch?v=IE4ipunZ-Pw">https://www.youtube.com/watch?v=IE4ipunZ-Pw</a></li> <li>- WG3 Integrated ecosystem monitoring and management: <a href="https://www.youtube.com/watch?v=WBR-jcvvTP8">https://www.youtube.com/watch?v=WBR-jcvvTP8</a></li> </ul> <p><b>Declaration</b></p> <p>The <b>Mediterranean "Ecosystem-based approach Declaration"</b> was prepared with input from associated partners and key stakeholders,</p>

	<p>launched in Brussels at the EU Parliament in 2018 and officially signed in Malaga in October 2019 by key authorities and Mediterranean organizations. It is available in various languages and a promotional video is periodically promoted in events: <a href="#">Arabic</a>; <a href="#">English</a>; <a href="#">Spanish</a>; <a href="#">Montenegrin</a>; <a href="#">French</a>; <a href="#">Italian</a>.</p> <ul style="list-style-type: none"> <li>- <a href="https://www.youtube.com/watch?v=FjWLYfOg-1k&amp;t=5s">https://www.youtube.com/watch?v=FjWLYfOg-1k&amp;t=5s</a></li> <li>- <a href="https://drive.google.com/file/d/1I_rX3xMhc2XzMfxA8JYqym6Sn9-6WSy/view?usp=sharing">https://drive.google.com/file/d/1I_rX3xMhc2XzMfxA8JYqym6Sn9-6WSy/view?usp=sharing</a></li> </ul>
	<p><b>HP EFFICIENT BUILDING</b></p> <p><b>Transferring strategy and Stakeholder clustering:</b> It contains the strategy and action plan for the capitalization of the MED MP according to the stakeholder's preferred typologies, for that an analysis of the main influence zones and the prioritization of the different clusters was introduced.</p> <ul style="list-style-type: none"> <li>- <a href="#">Transferring plan to capitalisation</a></li> <li>- <a href="#">Transferring strategy</a></li> </ul> <p><b>Capitalisation strategy Final:</b> It describes the objectives and activities aimed at sharing the Community's knowledge at large-scale and the relation with the target stakeholders introduced in the previous document.</p> <p><b>Communication strategy:</b> It highlights the main dissemination activities and target stakeholder related to each of them.</p>
	<p><b>HP GREEN GROWTH</b></p> <p>A strategy and action plan were produced for both transferring and capitalising Work Packages. The first plan includes different activities such as Mobilisation and Mutual Learning (MML) workshops, and training and matchmaking sessions to share MPs best practices in the field of green growth and to promote the effective transfer of concrete results into regional/national policies.</p> <p>The strategy and action plan on "Capitalising" includes the methodology to be used on mainstreaming and strategic liaising and advocacy activities, following the recommendations by Interreg MED and PANORAMED on the mainstreaming process.</p> <p>However, no concrete tools or approaches have been developed for the transfer of results between Givers and Takers yet.</p> <ul style="list-style-type: none"> <li>- <a href="#">Transferring strategy and action plan</a></li> <li>- <a href="#">Capitalisation strategy and action plan</a></li> </ul>
	<p><b>HP SUSTAINABLE TOURISM</b></p> <p>According to the reality of its own territory, each Antenna must prepare its <b>Action Plan</b>, including a series of activities that have the aim of bringing together givers and possible takers to facilitate the capitalisation process.</p> <p>The first step are informal <b>bilateral meetings</b> to take a first contact with the actors and check their possible interest in implementing the selected outputs.</p> <p>A more formal activity are the <b>Transferring Workshops</b>, which aim at bringing</p>

	<p>together policy makers, actors and projects' representatives in order to support the former in improving their tourism policies and the latter in increasing the spatial diffusion of their outputs. So far, ST project has organised a webinar on «Smart and Sustainable Mobility Measures in Tourist Destinations», jointly with Urban Transport Community and CIVITAS Destination project. For the 4<sup>th</sup> quarter of 2020, more participations in European events are foreseen: Forum TurisTIC, EWCR 2020, Smart Tourism Congress Barcelona. In 2021, IUCN Congress, OTIE Congress.</p> <p>Another key activity within the mainstreaming process are the <b>National and Regional Debates</b>, focused on regional and national authorities that share the same institutional and policy frameworks. While Transferring Workshop are mainly devoted to transfer MPs' outputs, National and Regional Debates will be addressed to capitalise the policy recommendations emerged from the Community to the different policy levels, with particular emphasis on the EU funds 2021-2027. In addition, the current crisis on COVID-19 has particularly hit the tourism sector and for this reason, the Community is working on building a joint message on priority investments for the sector recovery through the use of EU funds.</p> <p>Nevertheless, we have to point out that the current pandemic and the related restrictions on physical events have hindered the process of mainstreaming and planning of activities. Adaptation is still on its way, but it is evident that in case we will have to move all the activities online, the partnership will have to discuss which will be the best way to implement them, considering the technical issues as well as the particularities of each country.</p> <ul style="list-style-type: none"> <li>- Bilateral Meetings</li> <li>- Transferring workshops</li> <li>- National and Regional Debates</li> </ul>
	<p><b>Operational tools available:</b></p> <ul style="list-style-type: none"> <li>- Template of transfer plan (see annex 4 Factsheet 4)</li> </ul>

### Task 3: Implementation of the transfer plan

#### Context / feedback from the experimentation

In order to be effectively implemented, the transfer plan requires a pro-active management and a strong involvement of the stakeholders (Givers and Takers).

The experience from first experimentations has enhanced several main issues to be considered for a successful transfer process:

- Clear identification of people in charge of the process (operational implementation)
- Regular exchange between the Giver and the Taker about the implementation of activities (every two/three week minimum)
- Working meetings to exchange about the process and address organisational, technical, administrative questions...

During the experimentation, animation was provided by external experts. Then, the Givers were asked to take the lead and to manage the process with the Takers. The results were uneven from one territory to another and showed the importance to have a manager committed to this task.

#### Overview of practical aspects to consider for implementing the transfer process

<input type="checkbox"/> Format of the transfer meetings (in-person and/or remote) and profile of participants <input type="checkbox"/> Supporting documents for the transfer process (i.e. adaptation/re-use in a different context) <input type="checkbox"/> Types of formal commitment of the givers and the takers in the process <input type="checkbox"/> Arrangements for meeting the costs and expertise to implement the transfer process <input type="checkbox"/> Tools to ensure the reporting / monitoring on the main results and effects of the transfer process.	
What to do?	How to do it? <i>Recommendations from the experts + Practices and tips already experimented by HPs and SPs</i>
<b>3. Implement the transfer</b>	<p><b><u>GENERAL APPROACH</u></b></p> <ul style="list-style-type: none"> <li>- To have a manager committed in charge of the moderation and the leading of the process. Usually, this manager is on the side of the Giver. One of his tasks is to accompany the Taker in the realisation of its activities (if Takers are left alone, there is a risk of demobilisation).</li> <li>- To provide adequate resources to maintain the mobilisation of stakeholders. The results strongly depend on the involvement of stakeholders and on the willingness of Givers and Takers to achieve concrete results. Modest objectives with motivated stakeholders will produce more results than high level objectives with partners that are not involved.</li> <li>- Be flexible on the implementation of the transfer plan and maintain close contact between the Giver and the Taker with regular updates.</li> <li>- If relevant, organisation of transferring workshops or events – congress, international conferences, Forums...</li> <li>- Use of Transferring labs (Blue Growth – Blue Deal) or living labs (HP Efficient Buildings)</li> <li>- Capacity building webinars with IPA countries (HP Biodiversity); capacity building workshops (HP Efficient Buildings)</li> <li>- Organisation of bilateral meetings, consultation, capitalisation workshops, transferring seminars, transfer training events, empowerment events to present available outputs and get feedback from stakeholders (SMARTMED; Blue Growth; Sustainable Tourism, SHAREMED...). Involvement of stakeholders in activities of WP Testing, Transferring and Capitalising.</li> </ul>
	<p><b><u>SP B-BLUE</u></b></p> <ul style="list-style-type: none"> <li>- Activation of local communities for the implementation of pilot activities</li> </ul>
	<p><b><u>SP BEST MED</u></b></p> <ul style="list-style-type: none"> <li>- Organisation of Policy learning seminars in testing regions to engage local relevant stakeholders on model implemented and get their feedback on relevance and applicability</li> </ul>
	<p><b><u>SP SHAREMED</u></b></p> <ul style="list-style-type: none"> <li>- Organisation of several technical national meetings for local authorities to transfer methodology and practices; organisation of national groups and technical groups</li> <li>- Organisation of events or cross meetings with other non-ETC projects to share networks and check dissemination potential. These projects can help develop bridges with local/regional authorities in charge of systems developed by the</li> </ul>

	<p>project</p> <ul style="list-style-type: none"> <li>- Organisation of national training events and international workshops</li> <li>- Capitalisation workshop organised by SHAREMED the 14-15th December with the participation of ODYSSEA project. The objective is to develop relations with partner projects</li> </ul>
	<p><b><u>HP BIODIVERSITY</u></b></p> <p><b>Biodiversity Protection Tools Catalogue</b></p> <p>The MBPC Catalogue includes some of the tools for ecosystem-based management in the Mediterranean being developed by the Biodiversity Protection Community projects.</p> <p>The tools included in the Catalogue are classified into three types: monitoring tools; management tools; and geospatial tools and the catalogue translated into several languages</p> <p>The tools of the current MPs will be included in the catalogue.</p> <ul style="list-style-type: none"> <li>- Mediterranean Biodiversity Protection Tools catalogue - <a href="#">EN</a>, <a href="#">FR</a>, <a href="#">AR</a></li> </ul> <p><b>Participatory workshops</b></p> <p>A preparatory webinar and workshop are being planned to involve main Adriatic-Ionian ecoregion stakeholders to devise a transboundary action plan addressing joint governance to tackle cumulative impacts</p> <p><b>Participation to external events</b></p> <p>Participation to external events for dissemination and transfer purpose (Maritime Protected Areas Forum; IUCN world conservation congress)</p> <p><b>Trainings</b></p> <p>The Mediterranean Biodiversity Protection Community (MBPC) and the BlueMed Coordination and Support Action (Research and innovation for blue jobs and growth in the Mediterranean Area) are jointly organizing a preparatory webinar and course on “Science-Policy-Society interactions in ecosystem-based marine resources management and planning”, which has attracted the support of IOC/UNESCO and MSPGlobal.</p> <p>Demand-driven capacity building workshops are planned for particular territories (i.e. Montenegro), building on the experience of the MITECO workshop in July 2019 to showcase main BP project results via Spanish partners to key national authorities. The first online workshop is proposed for 20 November 2020 on climate change and MPAs (tbc).</p> <p>Other trainings will be developed during this second phase.</p> <ul style="list-style-type: none"> <li>- Course on “science-policy-society interactions in ecosystems-based marine resources management and planning”: <a href="https://biodiversity-protection.interreg-med.eu/media-calendar/news/detail/actualites/course-on-science-policy-society-interactions-in-ecosystem-based-marine-resources-management-and-pl/">https://biodiversity-protection.interreg-med.eu/media-calendar/news/detail/actualites/course-on-science-policy-society-interactions-in-ecosystem-based-marine-resources-management-and-pl/</a></li> <li>- Mainstreaming Mediterranean biodiversity protection tools into national initiatives &amp; Medsealitter and JRC working together: <a href="https://biodiversity-protection.interreg-med.eu/media-calendar/news/detail/actualites/mainstreaming-mediterranean-biodiversity-protection-tools-into-national-initiatives/">https://biodiversity-protection.interreg-med.eu/media-calendar/news/detail/actualites/mainstreaming-mediterranean-biodiversity-protection-tools-into-national-initiatives/</a></li> </ul>



	<p><b><u>HP BLUE GROWTH</u></b></p> <ul style="list-style-type: none"> <li>- Organisation of bilateral meetings between projects and regional authorities (by country)</li> <li>- Organisation of transfer training events</li> </ul>
	<p><b><u>HP EFFICIENT BUILDING</u></b></p> <p>In order to achieve its overall objective, the consortium of the Efficient Buildings had selected and develop a specific methodology for the main transferring and capitalisation events as follows:</p> <ul style="list-style-type: none"> <li>- Detailed design and implementation of Efficient Building Living Labs (EBLL)”</li> <li>- Develop of Capacity Building workshops.</li> <li>- Webinars associated with capitalization activities</li> <li>- City Twinning partnerships (D4.4)</li> </ul> <p>The document “<a href="#">Efficient Building Living Lab Methodology</a>” outlines in detail the different phases to implement the EBLL and the necessary steps to conduct in each of the parts, it also includes the timeline to conduct the activities and the resources needed to successfully implement them.</p> <p>All other activities are detail in “<a href="#">Transferring plan to capitalisation</a>”, the document contains a general timeline, methodology for each case and the reference to other documents related to the targets and outcomes to be transfer.</p>
	<p><b><u>HP GREEN GROWTH</u></b></p> <ul style="list-style-type: none"> <li>- <b>Remote meetings over Teams and exchange of materials via email.</b> Two people participate in these meetings – the taker side represented by a project manager from a reference centre for the development and consolidation of innovative and technological company projects, which belongs to the Regional Government of Aragon, and the giver side represented by a technician. An <b>in-person training workshop</b> organised in November 2021 as part of the mainstreaming, where people from the reference centre and the Regional Government were able to familiarise themselves further with the mainstreamed outcome.</li> <li>- <b>Organising remote meetings to exchange information and have discussions was not ideal but worked out in the end.</b> The <b>language barrier</b> between the project partner leading the mainstreaming activity (English) and the taker and giver (Spanish) also posed a challenge but was overcome by engaging the Spanish project coordinator in the activity.</li> <li>- <b>Participation and contribution in national and European working groups:</b> participation in the ministerial declaration of the Union for the Mediterranean and in the European circular economy stakeholder’s platform</li> </ul>
	<p><b><u>HP RENEWABLE ENERGY</u></b></p> <p><u>Community building and transfer process</u></p> <ul style="list-style-type: none"> <li>- Creation of <b>regional groups in 5 MED countries</b> gathering key stakeholders and potential takers.</li> </ul> <p>The type of actions taken were:</p> <ul style="list-style-type: none"> <li>- Presentation of the project to regional groups and B2B meetings</li> <li>- Creation of material in different languages (tutorials, handbook).</li> <li>- Organisation of coaching sessions in different languages;</li> </ul>



	<ul style="list-style-type: none"> <li>- Organisation of a call for proposals for flagship cases.</li> <li>- Organisation of <b>online training workshop</b> in English and local languages</li> <li>- Realisation of <b>tutorials</b> in local languages</li> <li>- Creation of a <b>handbook</b> in local languages</li> <li>- <b>B2B meetings</b> and dedicated online workshops and coaching sessions.</li> <li>- We used few <b>animation tools</b>, mainly <b>MURAL</b> during workshops.</li> <li>- We would need to <b>strengthen skills on these type of tools</b> for further events.</li> </ul> <p><b><u>HP SOCIAL AND CREATIVE</u></b></p> <p><u>Community building process</u></p> <ul style="list-style-type: none"> <li>- <b>Transferring Working Groups</b> online sessions with the involvement of participants interested in the specific topics and results (practitioners, policymakers, field experts, stakeholders, civil servants, SMEs and start-ups, representatives and Social &amp; Creative partners and associates, and S&amp;C modular projects, Regional Authorities, Universities)</li> </ul> <p><u>Main experiences in transfer process activities adopted:</u></p> <ul style="list-style-type: none"> <li>- a regular production of <b>Policy Briefs, focused and accessible documents</b> highlighting the importance of specific issues thrown up by interactions with the S&amp;CI Community, to be used for transfer testing procedures functional to the Capitalisation activities;</li> <li>- <b>three Innovation Camps</b> to help identify stakeholders' needs to be transferred, together with "<b>Focus and Transferring Working Group (FTWG)</b>" action in defining/identifying/clustering: <ul style="list-style-type: none"> <li>o givers,</li> <li>o results/outputs that are available, concrete and relevant for a transfer process (modular project, expert, stakeholder)</li> <li>o tools for the identification and engagement of relevant takers.</li> </ul> </li> <li>- The FTWG is also the place where to individuate the key instruments and the boundaries condition to be used for the implementation of policy templates visually displayed as Oriented Bayesian Nets (OBNs), with the twin advantage of projecting policy development across time - not only space or domain as usually happens with cyclical representations of the policy process - and of including in the same policy process instance alternative options in terms of usage of innovative support Oriented – (For a more detailed presentation, see the note "<a href="#">Social and Creative – Good practices</a>")</li> </ul> <p><b><u>HP URBAN TRANSPORTS</u></b></p> <ul style="list-style-type: none"> <li>- <b>Urban Transports Mentoring call</b> : a scheme to support, guide and provide advice to takers by <b>thematic experts / mentors</b> on the basis of the experience and lessons learnt of pioneers / former modulars. <b>An adaptation report</b> is prepared and bilateral and visiting meetings are organised. A new commitment is fostered on the replicators' side, while the commitment to work on the field is strengthened on the pioneers' side.</li> <li>- The lack of active involvement from former modular partners is <b>covered by the figure of the mentor or thematic expert per each pair</b>.</li> <li>- A <b>mentoring guide</b> ensures the homogeneity of the process in the 8 territories</li> </ul>
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	and the possibility to compare reports and results across the different cases.
<b>Operational tools available:</b> → Feedback from PANORAMED experimentation (see annexe 5 Factsheet 4)	

### Transversal Task: Coordination between projects and communities

#### Context / feedback from the experimentation

The implementation of Horizontal and Strategic projects shows the necessity of a better cooperation and coordination between projects and between thematic communities in order to better share outputs, tools, best practices, communication activities, events, etc.

What to do?	How to do it? <i>Recommendations from the experts + Practices and tips already experimented by HPs and SPs</i>
<b>4. Develop common or coordinated activities between projects and between communities</b>	<b><u>SP BEST MED</u></b> <ul style="list-style-type: none"> <li>- Organisation of a joint transferring seminars in April 2021 between BEST MED and SMARTMED (<a href="#">link</a>)</li> </ul>
	<b><u>SP MED MED OMoSIS</u></b> <ul style="list-style-type: none"> <li>- Training sessions proposed by Med OSMoSIS to other projects (COSMO VIEW for Maritime Surveillance)</li> </ul>
	<b><u>HP BIODIVERSITY</u></b> <ul style="list-style-type: none"> <li>- Coordination between HP Biodiversity and Sustainable Tourism for the participation to the IUCN World Conservation Congress 2021 Drafting of a first technical factsheet with Biodiversity, Blue Growth and Renewable energy communities on marine bio energy. Biodiversity HP is increasing its collaboration with other Horizontal projects</li> <li>- Organisation the 25th of May 2021 of a webinar with three HPs (Biodiversity, Sustainable Tourism, and Blue Growth)</li> </ul>
	<b><u>HP BLUE GROWTH</u></b> <ul style="list-style-type: none"> <li>- Necessity to look for transfer and mainstreaming tools in other communities (Blue Growth)</li> <li>- To setup enlarged working groups involving participants from different communities and producing deliverables common to the three communities Setting up of a Community toolbox aiming to gather and share data from each Horizontal Project (types of tool, description, geographical scale, etc.) (Blue Growth and Biodiversity Horizontal projects). The toolbox will be hosted at the end of 2021 by the MED programme platform</li> </ul>