The role of staff exchange and mobility schemes in accelerating innovation policy transfer and uptake of good practices

A Policy Brief from the Policy Learning Platform on Research and innovation

November 2018
Summary
Cluster initiatives and their related cluster organisations are increasingly being deployed by European regions to help implement innovation and research strategies. They are also considered important ecosystem intermediaries for accessing and delivering services to SMEs. Many studies have demonstrated that the performance of regional economies and enhancing territorial cohesion can be helped by improving learning and policy exchanges. Current policy trends demonstrate an increasing interest in deploying staff exchange and mobility schemes to enhance regional innovation performance and accelerate learning and good practice and policy design and implementation. DG GROW also plans to launch a new dedicated activity entitled ClusterXchange pilot scheme as part of the COSME Cluster Excellence programme. Funding levels of many of the ERASMUS exchange based schemes are also planned to increase. Several Interreg Europe projects, notably those engaged with clusters, have already implemented mobility schemes and have noted positive impacts on those regions and organisations involved. The reinforcement of such mobility schemes provides the Interreg Europe community with a range of concrete opportunities within the cluster thematic and more generally in support of innovation stakeholders. The Policy Learning Platform team has developed a range of services such as Expert Support and Peer Learning that can help project partners design staff exchange and mobility schemes.

Introduction
The success of many Interreg Europe projects lies in the ability of partnerships to learn and share policy experiences and implement good practices. Staff exchange and mobility schemes such as ERASMUS have demonstrated for many years the value added of such initiatives. The objective of this policy brief is to present some of the examples of mobility/staff exchange schemes that have deployed within Interreg Europe projects, notably to support innovation and cluster programme development. It identifies ways in which such approaches can contribute to territorial cohesion as well as supporting the transfer of policy excellence. The policy brief concludes by identifying how the Interreg Europe Policy Learning Platform (PLP) may be of support to this type of cooperation, before concluding with some concrete suggestions for the development of such policy learning and sharing approaches.

Why this policy brief?
The focus of this Interreg Europe policy brief is to highlight some of the different ways in which mobility and staff exchange schemes have been implemented by partnerships with a particular focus on schemes focusing on cluster organisations. This can raise awareness amongst other regions that might be currently preparing and designing their mix of methodological tools to be deployed for implementing policy exchange and learning actions. It can also be of use to regions seeking ways in which to accelerate policy instrument development and eventual deployment by enabling a more in depth understanding of the innovation policy framework.

Understanding the specific framework conditions in individual regions that underpin policy interventions is a pre-requisite of policy exchange and transfer actions. Mobility and staff exchange schemes can allow regions to accelerate this knowledge transfer and ensure their staff have the necessary skills that will be subsequently required to implement policy instruments.
The policy brief is structured as follows: brief policy overview of cluster programmes, the ERASMUS “brand” including the forthcoming DG GROW ClusterXchange pilot scheme, a presentation of Interreg Europe project experiences, an identification of some of the challenges related to such approaches followed by some ideas of how the Policy Learning Platform can support the project community and concludes with some recommendations.

Policy Background

Cluster initiatives and their related cluster organisations are increasingly being deployed by European regions to help design and implement regional innovation and research strategies. There are currently over 850 cluster organisations profiled on the European Cluster Cooperation Platform¹. These clusters cover a broad spectrum of industry sectors and there are considerable variations between countries and regions in terms of policy framework conditions, funding models etc. They are also considered important ecosystem intermediaries for accessing and delivering services to SMEs. DG GROW has put in place a number of cluster initiatives² via the COSME programme to support clusters in the fields of internationalisation, smart specialisation strategies, cross sectoral value chain collaborations, and cluster excellence.

New DG GROW ClusterXchange Pilot Scheme

The success of ERASMUS type initiatives has led DG GROW to consider introducing a mandatory cluster manager exchange and mobility pilot action as part of the cluster excellence initiative funded through the COSME programme³. It is expected that a call will be launched later in 2018. The aim of the programme will be to accelerate learning and experience exchanges and lay the foundations for more in-depth interregional cooperation. It seeks to address training and business needs along the value chain that require SME and cluster managers’ skills to adapt to trends, challenges and opportunity that come along with industrial change. This could take the form of developing joint initiatives such as organising twinning, collaboration, networking and learning activities and cooperation projects. It will also allow for the construction of new industrial value chains, help connect regional policy makers in accessing other cluster policy good practices and facilitate strategic partnering between clusters and specialised eco-systems across Europe. This scheme is considered to meet one of the core needs of the regional cluster community namely, learning from others, developing targeted policy instruments, creating trust based cooperation relations and laying the foundations for long term interregional or thematic cooperation.

The ClusterXchange pilot mobility scheme will cover the promotion, recruitment, matching and follow-up of short-term visits or exchanges. The scheme aims to offer the possibility for participants to spend a minimum of three working days and up to a maximum of a month in a cluster. A particular attention will be given to cluster organisations, where a reversed mobility is foreseen, i.e. where visiting cluster organisations also become a host.

Some other similar mobility schemes are described below.

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¹ https://www.clustercollaboration.eu/
² http://ec.europa.eu/growth/industry/policy/cluster_en
³ https://ec.europa.eu/growth/industry/policy/cluster/excellence_en
ERASMUS+

Erasmus+\(^1\) is one of the better known EU initiatives and focuses on supporting mobility and exchange programmes in the fields of education, training, youth and sport. On 30 May 2018, the Commission adopted its proposal for the next Erasmus programme, with a doubling of the budget to 30 billion euros for the period 2021-2027\(^2\). The ERASMUS “brand” has also been deployed in support of young entrepreneurs through the Erasmus for Young Entrepreneurs programme\(^3\).

Currently a cluster management training and skills development is being developed in the Clustert4Smart project\(^4\) funded under the Erasmus+ programme and it includes a dedicated element linked to the promotion of mobility to enhance cluster manager learning and exchange processes.

A range of other grants and mobility schemes for young researchers as well as SME employees can also be developed using the Marie Skłodowska-Curie programme\(^5\). The programme announced in June 2018 that some €80 million would be dedicated to boost research and innovation staff exchanges. A number of Twinning\(^6\) programmes also exist, for example those supported under H2020 focus on research establishments. Activities like short-term staff exchanges, expert visits, on-site or virtual trainings, workshops, conference attendance, dissemination and outreach are supported. The programme evaluation report provides an insight into some of the benefits of such programmes\(^7\).

Meanwhile, within Interreg Europe project policy learning and exchange experiences typically include interregional workshops, best practice or benchmarking exercises and study visits focusing on showcasing regional good practices. Individual or small group mobility or exchange schemes however are less frequent deployed. It is therefore the intention of this policy brief to review some of the more recent Interreg Europe Project experiences in this field, particularly those that have a cluster focus and that can be analysed in light of the new DG GROW cluster mobility programme.

Experiences from Interreg Europe projects

All Interreg Europe projects include activities aimed at learning about regional innovation ecosystems, accessing best practices and participating in policy mapping exercises. However, the “one on one” staff exchange or mobility scheme is a relatively uncommon activity. Such concepts seem to be growing in importance with many Interreg projects now implementing such schemes. Furthermore, the heightened interest and funding of ERASMUS type initiatives and in particular the forthcoming DG GROW cluster manager mobility scheme illustrate that

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1 https://ec.europa.eu/programmes/erasmus-plus/node_en
4 Cluster4Smart www.pole-scs.org
5 https://ec.europa.eu/research/mariecurieactions/The Marie Skłodowska-Curie actions (MSCA) support researchers at all stages of their careers, regardless of age and nationality. Researchers working across all disciplines are eligible for funding. The MSCA also support cooperation between industry and academia and innovative training to enhance employability and career development.
these types of actions are likely to become more common. This section of the policy brief focuses on four interesting Interreg Europe project examples:

- CLUSTERIX 2.0
- HELIUM
- TRINNO
- InnoBridge

Some additional projects are listed in Annexe 1.

The CLUSTERIX 2.0 project seeks to address the improvement of regional innovation policies by making better use of clusters. The project focuses on complementary industrial and research competences, and the implementation of strategic cluster partnerships, to find new ways to facilitate intra and interregional cooperation. The project has deployed a methodology for exchanging experiences and learning between the partners: dedicated activities like workshops, events, peer-reviews, study trips and staff exchanges have enabled participating organisations to learn, adapt the good practices to the realities of their regions and implement on this basis new measures and actions leading to a better policy making.

**Staff exchange activities** between project partners have been developed as an opportunity to gain deeper understanding of each other’s structures and systems, reflect on one’s own activities, and to generate new ideas through discussions. In May 2017, a cluster manager from Lead Partner ecoplus in Lower Austria visited the project partner INMA (National Institute of Research – Development for Machines and Installations designed to Agriculture and Food Industry) in Romania. This staff exchange sparked in-depth discussions with several local cluster managers, companies’ representatives as well as members of relevant Ministries about cluster strategies, funding schemes and cluster mapping. In this case the staff exchange discussions, together with the experience from the other knowledge exchange activities, and lessons learned from the Flemish Cluster Programme, allowed for the transfer of concrete information regarding the content of the cluster policies that enabled the Romanian Ministry for Research and Innovation establishing a new funding scheme for cluster management organisations financed by the Romanian national RDI Plan.

A second staff exchange took place between the CLUSTERIX 2.0 lead partner and the West-Pannon Regional and Economic Development Non-profit Ltd. This provided the opportunity for intensive learning about Hungarian economic and innovation policies, regional development activities and cluster management challenges. The staff exchange included meetings with several levels of relevant stakeholders, such as the head of Department for Cluster Development and the head of Department of Enterprise Development in the Hungarian Ministry for National Economy, the Agro ICT cluster manager, and of course West-Pannon representing the regional perspective.

In both cases it was important for partners to carefully plan the staff exchange process well in advance to ensure the availability of the correct staff, both in the host region and the visiting partner region.

The following quote from ecoplus the lead partner illustrates the benefits of such exchanges: “Although I have been working with Hungarian partners in European SME and cluster related projects for 15 years already, this one-week staff exchange helped me a lot to gain a better...
overview and deeper understanding of structures and approaches in the Hungarian economic development system. Putting yourself into your neighbour’s shoes for a while helps reflect on your own activities and triggers new ideas. This is an experience I recommend to everyone.” - Simone Hagenauer, ecoplus. The Business Agency of Lower Austria.¹

The **HELIUM** project, focusing on the thematic area of innovation in the health sector, engaged in its second round of staff exchange actions in February 2018. The lead partner, Brainport from the Netherlands, describes the staff exchange actions as “allowing for deeper analysis of the good practices which have previously been identified over the course of the project ... insights into the practical functioning of a good practice”. Representatives from Hungary and the Netherlands engaged in this latest activity and were hosted by the Portuguese project partners (University of Porto and the Portuguese National Innovation Agency).

The staff exchange programme focused on two good practices which have been provided as input into the project, RESOLVE² and HAITool³. Further examples of HELIUM staff exchange be found on the project website.⁴ Parallel to developing a more profound understanding of these good practices, the staff exchange participants were also able to discover more information about other relevant organisations and initiatives in the Norte region. Visits to various organisations (INESCTEC – Institute for Systems and Computer Engineering, Technology and Science – and CMIN – the Maternal and Child Care Centre of the North) enabled the staff exchange actors to get a better understanding of the innovation framework conditions and therefore provide an insight into what needs to be addressed to facilitate transfer and uptake in other regions/countries.

Similar actions described as “staff exchanges” have been developed in the **TRINNO** project. They aim to help project partners to learn more about the good practices and identify key issues regarding their transferability. In the most recent case an expert from the University of Barcelona partner, travelled to the Tuscan partner Arezzo Innovation to meet innovation policy makers and local researchers. The staff exchange process allowed the participants to pursue detailed discussions and review the meaning of seemingly “similar terms” that are not always understood in the same way. For example, the notion of digital innovation is differently understood by the project partners (based on their cultural framework, language, etc.). The result of this staff exchange discussion led partners to agree upon the development of an activity termed “Back to Scratch: co-creation of a shared glossary on digital innovation”. The staff exchange partners from Catalonia and Tuscany were also able to share experiences on operational aspects regarding their respective RIS3 strategies.

The **InnoBridge** staff exchange concept consists of preparing a programme of visits from one partner region to at least two other InnoBridge partner regions. The aim is to learn in detail about the targeted policy instrument and good practice for inspiration regarding the preparation of the regional Action Plan. The first staff exchange experience of the InnoBridge project involved the Alentejo Regional Development project partner visiting the Tampere partner in Finland in September 2017. The four-day staff exchange visit consisted of a range of meetings

² [https://www.interregeurope.eu/policylearning/good-practices/item/1439/resolve/](https://www.interregeurope.eu/policylearning/good-practices/item/1439/resolve/)
and participation in regional events including meetings with innovation policy makers and operational business development agencies such as Business Tampere and participation in the MINDTREK conference. A visit to the Tampere University of Technology focused on a presentation of Kampusareena, a shared innovation platform of companies, researchers and students. Overall the staff exchange participants were able to gain a detailed insight into the innovation culture of the Tampere City region that has created an innovation ecosystem that was included among the 10 finalists of the European Capital of Innovation Award 2017.

Challenges for Developing Staff Exchange and Mobility Schemes

Staff exchange and mobility schemes can play an important role in helping regions move beyond the simple “visit and exchange” process and progress towards the deployment of new policies. The effectiveness of such activities is also dependent on managing the “timing” issue to ensure maximum value added. Indeed, exchange or mobility actions should ideally be implemented after the initial regional visits and benchmarking activities have been completed and the policy instruments analysed and an interest in further analysis/transfer has been assessed and validated by the project partner. The experience of the cluster led staff mobility initiative from CLUSTERIX2.0 is a good example of these issues.

Sharing methodological approaches

The project examples presented above illustrate some of the different approaches implemented by project partners. These include:

- Targeted organisation to organisation visits based on a one-week detailed immersion in strategic and operational issues, in this case related to clusters (CLUSTERIX2.0)
- In depth ecosystem visits in which a range of innovation policy initiatives and actors are presented in order to get a detailed insight into the ways cities/regions create the right policy mix and advantageous framework conditions (InnoBridge)
- Policy makers or expert-led exchanges focused on operational insights into strategy development (TRINNO)
- A visit to focus on a specific good practice prior to transfer and uptake (HELIUM)

The first step in all types of actions concerns the definition of clear objectives to ensure a suitable visit programme is organised and the correct individuals are mobilised in the host region. The “host” participants should also be selected with a clear view on how they will also benefit from the “visit”, as the benefits need to work in both directions. The proposed DG GROW supported cluster mobility programme highlights the need to focus on both strategic and operational issues and on ensuring cluster partners capitalise on their experiences.

The design of a bespoke visit agenda needs to reflect these objectives and identify those individuals (in host and visiting region) that are most suited to benefit from the exchange and fulfil the post-visit implementation actions. The project examples presented above illustrate that follow up actions are as important as the visit and require careful attention. This includes both dissemination actions with the region and also to other project partners.

Project experiences have shown that representatives of innovation or business development agencies and cluster managers are suitable candidates for staff exchange activities dedicated to the transfer of policies or actions with a strong operational component. In such cases the
time lag between the exchange process and the deployment of new actions can be relatively short. Regional policy maker led exchanges focussed on reviewing the transfer of a good practices such as a new financial instrument, are also suitable actors for staff exchange but the time lag between the learning and exchange action and deployment will typically require more time.

Furthermore, new Interreg Europe projects (Call 3) can be made aware of the opportunities and benefits that such transfer actions bring and how they can be best integrated into the methodological tool box that is implemented prior to Action Plan development. Indeed, staff exchanges should be seen as part of a continuous learning and exchange process and not a standalone initiative.

How can the Policy Learning Platform support?

The Interreg Europe Policy Learning Platform’s capitalisation services such as the preparation of articles and the promotion of good practices could be utilised to identify and showcase successful staff mobility schemes and their outcomes. These could be uploaded to the Policy Learning Platform Good Practice database. The Policy Learning Platform could also facilitate exchanges on this theme during future thematic workshops and help regions prepare their ecosystems to take up the opportunities of the Erasmus for Clusters pilot mobility scheme.

Supporting European territorial cohesion

Policy actions that can demonstrate tangible and measurable research and innovation impacts and that contribute to the acceleration of territorial cohesion and enhance the implementation of current Structural Programmes 2014-20 are relevant targets for mobility schemes. Staff exchanges can also allow for the future operators of new instruments to gain an in-depth insight into relevant policies and practical issues as well as a better understanding of the framework conditions necessary for their successful transfer.

The lessons learned by participants can also have a broader impact on the project partnership by highlighting a common challenge or issue that is also faced by other regions. For example, this could spark an interest in common policy learning or a training exercise on a specific theme for selected individuals involved in policy design and/or implementation focused on shared smart specialisation strategies or SME support initiatives.

How can the Policy Learning Platform support?

The Interreg Europe Policy Learning Platform can assist project partners in designing staff exchange actions that are focused on territorial cohesion dimensions. For example, through the organisation of a webinar or through the exchanges that can be facilitated in Peer Learning exercises or expert support and help them identify good practices in order to design their own cluster mobility actions or initiatives.
Selecting Staff exchange participants and skills development issues

Staff exchange actions can have an important impact on the skills development process for the individuals that are involved. It is therefore important to carefully select those that will participate in such activities. The type of individuals will vary depending on the objective and type of the action (see list above). For example, organisational capacity building activities need to involve and engage with senior to middle ranking operational managers that have the skills and competences that will enable them to implement the lessons learned. Their experience and knowledge can also benefit and be shared with the host region.

More generic mobility schemes that seek to gain a better understanding of innovation policy framework conditions and good practices will seek to engage with policy makers that are focused on strategy development activities and policy implementation. Meanwhile those managing authority’s intent on transferring a specific policy instrument or good practice need to ensure the engagement of those responsible for the drafting of new policies and for securing political and funding support.

In all cases the individuals will benefit from the skills development and learning experience. In order for these benefits to be shared, significant efforts and resources must be dedicated to their capitalisation within all organisations participating in the scheme.

How can the Policy Learning Platform support?

The Interreg Europe Policy Learning Platform can assist in developing the skills and HR dimension aspect of mobility and staff exchange schemes through promoting the results and through the expert support service and the peer learning service offer. This can enable managing authorities to meet with experts that have participated in staff exchanges enabling them to better understand how such processes can accelerate policy instrument transfer.

The lessons and experiences of partners regarding staff mobility and exchange schemes can also help prepare regional stakeholders position themselves for securing additional resources from other programmes. The examples from the cluster project community and the future DG GROW ClusterXchange pilot mobility scheme represent good illustrations of this approach. As illustrated above, the IR-E cluster manager mobility schemes and those that will be promoted by the COSME cluster excellence programme can help lay the foundations for more in-depth cooperation, including co-bidding for new projects and the shaping and design of new policy instruments but also help shape and influence the implementation of the current 2014-2020 Structural Funds programmes.

Way Forward

Current cluster policy trends, notably the funding support DG GROW plans to provide for implementing cluster manager mobility, represent an interesting opportunity for regional innovation policy makers and the cluster community in general. The opportunities provided by the different types of staff exchange and mobility schemes that have been implemented by Interreg Europe Projects illustrate the concrete impacts that such in depth exchanges can have on policy development, implementing the current 2014-2020 programmes and cohesion.
policies in general. In particular, they can help partners gain a detailed understanding of how other innovation ecosystems work, using the knowledge gained as an inspiration to improve and design new policy instruments, for example on how to deliver targeted support to SMEs. Many of the stakeholders involved in such actions, such as cluster managers and cluster policy makers believe that they provide an unprecedented instrument to accelerate the development of research or innovation capabilities in areas important for Europe. Some concrete suggestions are set out below:

- Good staff mobility schemes are based on a “bilateral” arrangement and the agenda development process should be co-developed by the two organisations;
- Sharing a detailed understanding of policy framework conditions and financial instruments in the host and the visiting partner region is essential for subsequent policy implementation;
- Selecting partners on the basis of shared smart specialisation strategies or value chains or based on similar challenges such industrial transition can also facilitate the implementation and value added of mobility and exchanges schemes;
- Mobility exchanges, such as those already tested with the IR-E cluster manager community have proven to be effective tools for developing territorial cohesion, helping to implement current 2014-20 Structural Fund programmes and policy instrument excellence as they provide the detailed insight necessary to prepare for policy transfer;
- Mobility schemes can also accelerate the take up of new solutions and facilitate the development of strategic plans for better cooperation at European level;
- Duration: A minimum of 4-5 days is required for both parties to fully benefit from the staff mobility exchange process;
- Careful attention needs to be given to the selection of staff exchange participants;
- Sharing results of the mobility methodology, experiences and lessons learned with project partners to enhance implementation is important; and
- Devising capitalisation techniques to share results with the wider policy community and to create the conditions for European level capitalisation are important.

The trust and knowledge shared between project partners means that the Interreg Europe community is well placed to take advantage of staff mobility and exchange schemes. The Interreg Europe cluster manager community has proven to be particular effective in utilising such approaches and are well placed to take up further opportunities such as those offered in the forthcoming COSME Cluster Excellence programme. By encouraging and facilitating open discussions through mobility exchange type schemes Interreg Europe can accelerate the uptake of good practices and deliver concrete and enhanced policy impacts through the adoption and design of new policy instruments and accelerate and support the implementation and uptake of current Structural Funds.
Policy Learning Platform on Research and innovation

Sources, further information

- Marie Skłodowska-Curie programme [https://ec.europa.eu/research/mariecurieactions/](https://ec.europa.eu/research/mariecurieactions/)
- Cluster4Smart [www.pole-scs.org](http://www.pole-scs.org);
- HELIUM good practice RESOLVE [https://www.interregeurope.eu/policylearning/good-practices/item/1439/resolve](https://www.interregeurope.eu/policylearning/good-practices/item/1439/resolve);
- News of staff exchange in CLUSTERIX 2.0 [https://www.interregeurope.eu/index.php?id=23&no_cache=1&tx_tevnewsevents_newssingle%5bnews%5d=4111](https://www.interregeurope.eu/index.php?id=23&no_cache=1&tx_tevnewsevents_newssingle%5bnews%5d=4111)
Annex 1: Selection of relevant TO1 Interreg Europe projects involving staff mobility or staff exchange experiences

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<tr>
<th>Project</th>
<th>Activity</th>
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<tbody>
<tr>
<td>CLUSTERIX 2.0</td>
<td>Targeted organisation to organisation week-long visits based on immersion in strategic and operational issues.</td>
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<tr>
<td>HELIUM</td>
<td>Visits focused on specific good practices prior to transfer and uptake.</td>
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<tr>
<td>TRINNO</td>
<td>Policy makers or expert-led exchanges focused on operational insights into strategy development.</td>
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<tr>
<td>InnoBridge</td>
<td>In depth ecosystem visits in which a range of innovation initiatives and actors are presented in order to get a detailed insight into the ways cities/regions create the right policy mix and balanced of framework conditions.</td>
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<tr>
<td>INKREASE</td>
<td>Visits by both groups of partners and individual partners, focused on regional innovation ecosystems and specific good practices.</td>
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<tr>
<td>NICHE</td>
<td>Visits by project partners and stakeholders in order to meet ecosystem actors and discussing regional good practices.</td>
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<tr>
<td>OSIRIS</td>
<td>One staff exchange occasion with all partners included, focussing on the use of open data for driving innovation and territorial growth.</td>
</tr>
<tr>
<td>STRING</td>
<td>Three pre-defined regions hosting representatives of two regions at a time. Staff exchanges last for a 3 to 4 days where participants merge into the daily activities of the hosting organisations, meet the stakeholder group, and visit the local counterparts of the visitors’ organisational affiliation.</td>
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Research and innovation

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#ResearchAndInnovation #InterregEurope #policylearning #staff exchange #Erasmus #mobility schemes #COSME #clusters