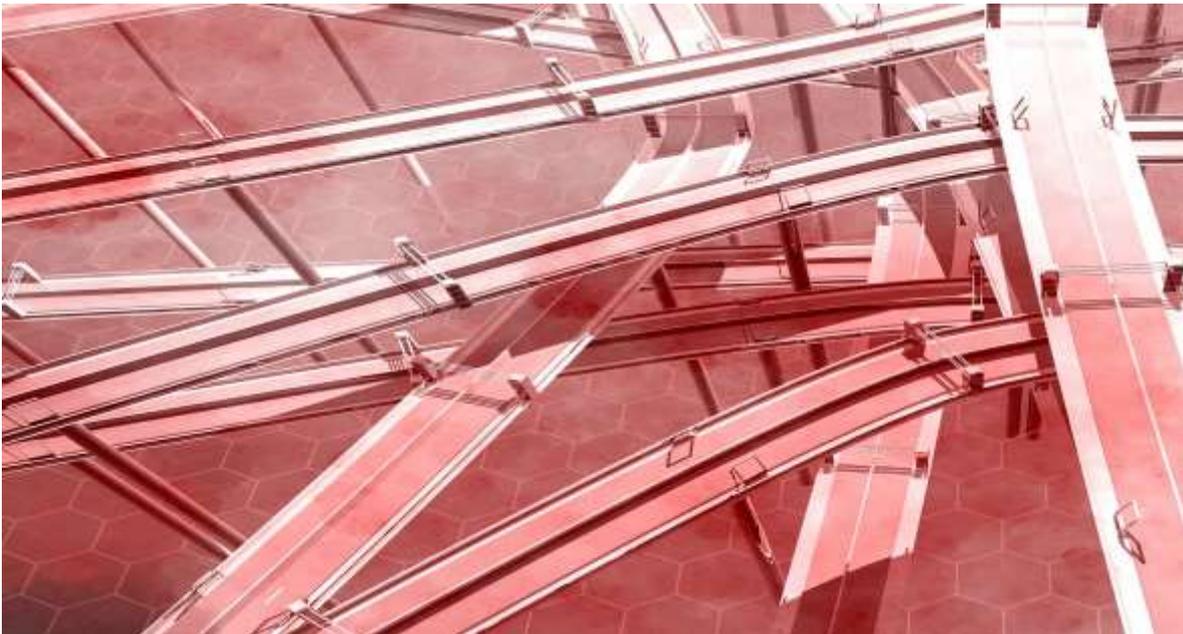


RECREATE
REinforce Competitiveness of REgionAl
Transport SMEs
PGI05275
STUDY VISIT GUIDE



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Table of Contents

Table of Contents	3
List of Figures	3
Abbreviations	4
Executive summary	5
1. Introduction.....	6
1.1 RECREATE project	6
1.2 Description of study visit guide	7
2. Methodology	8
2.1 Preparation for Study Visit	8
2.2 Site Tour.....	9
2.3 Workshop or Seminar.....	9
3. Timetable.....	10
3.1 First study visits.....	10
3.2 Second study visit	13
3.3 Third study visits.....	13
3.4 Fourth study visits	13
3.5 Fifth study visits.....	14
3.6 Calendar of the Study Visits	14
4. Monitoring & quality control of the process.....	15
References	16
Annex1: STUDY VISITS REPORT & EVALUATION	17

List of Figures

Figure 1: Partnership	6
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Abbreviations

EC:	European Commission
EU:	European Union
PA:	Partnership Agreement
SME:	Small or medium-sized enterprises

Executive summary

This manual contains the indications for organizing and conducting the Study Visits of the RECREATE project. It is produced by the Region of Campania and, through the submission of individual contributions in revision format, it is open to the contribution of the partners, in all its parts; in the same way it is continuously updated by the partners, as they have new information available.

RECREATE will improve the capacity and capability of regional transport SMEs to further develop and grow, this includes support for:

1. Research and Development
2. Rapid development and implementation of products and services
3. Access to finance schemes
4. Internationalisation opportunities

RECREATE adopts a holistic approach to SME support by improving all the relevant schemes that could potentially deliver growth to the regional transport SMEs. Recognising the importance and the potential of the transport SMEs in the economies of the regions involved, RECREATE will map transport SME support measures and assess their effectiveness. The integrated approach adopted by the RECREATE project will drive the identification and development of support mechanisms in the transport SME sector and it will ultimately deliver Action Plans and policy recommendations for evidence -based policy improvement.

On the basis of results of the previous programmes, RECREATE aims to create region specific elaborated guidelines on how to better support, guide and fund transport SMEs to boost their productivity and innovation. The partnership will work to take advantage of emerging market opportunities such as the demand for new forms of mobility, the light electrical vehicles, smart mobility, big data usage in transport etc.

The integrated approach adopted by the RECREATE project will drive the identification and development of support mechanisms in transport SME sector and it will ultimately deliver Action Plans and policy recommendations for evidence - based policy improvement.

The main outputs of this activity are the Good Practice Handbook and the 'Transport SME Competitiveness' report. RECREATE will also deliver a 'slim version' of this report.

1.2 Description of study visit guide

To reach the project purposes, international study visits are among the main activities of RECREATE, to share experiences with stakeholder of different cultural backgrounds.

Study visits, based on the observation of good practices, aim to develop mutual understanding and provide an opportunity to share experiences to develop effective action plans.

The study visits will be based on this 'Study visit guide' prepared by the PP2 and it will be presented at the Kick off meeting.

This study visit guide has been conceived to detail the objectives and the processes to be adopted including an evaluation matrix.

2. Methodology

The Study Visits will allow all project partners to learn about different good practices developed in each participating regions. Therefore, all partners will visit all regions in order to guarantee the policy learning experiences.

The Study Visit Methodology will allow partners to identify the challenges, barriers and support instruments, which one must bear in mind while aiming to achieve the objectives of the project, as well as best practices and success stories from both SMEs and any entity that provides support to SMEs that are already making headway in this field.

Regarding the selection criteria that project partners must consider when organizing study visits, RECREATE leave them the freedom to judge which practices are good and transferable.

Below we will describe how the method to obtain valid, reliable and adequate results is structured.

The duration of the Study Visits will be a minimum of one and half working days, where around 6 entities per region (both Agencies developing support policies/instruments and SMEs) will be presented (either through presentation at the venue, or in situ visits – at least two).

The number of participants per project partner will be 2 representatives excluding the external experts.

In the case of support environment the objective will be focused on learning from the policies already in practice that have produced what can be considered best practices for the purpose of this project.

In the case of SMEs, the objective will be focused on learning about the good practices related to the project objectives and the experience related to the use of support policies implemented.

Each PP will pursue the following STEPS in order to gather the necessary information needed to transform each visit in a learning experience suitable to be transferred to other EU Regions:

- Preparation for site visit
- Site tour
- Workshops

2.1 Preparation for Study Visit

It is essential that the preparation work is done before the study visit takes place.

An initial meeting or a telephone discussion with the support institution and / or the SME to visit will be organized and held with the person(s) responsible for the tools / issues of interest for RECREATE. The purpose of this meeting is to discuss the visit and the reasons why this entity was selected. At the same time, the opportunity will be used to disseminate the goals of the RECREATE project.

Each Project Partner will have to identify 10 good practice examples (50 in total), of which 5 or 6 will be selected as Study Visits. Regional agents/stakeholders that are identified to have interest in the study visits (SMEs organizations, Clusters, Policy makers, Regional Entities promoting and supporting SMEs Internationalisation, etc.) should also be invited.

Site-visit documentation: the agenda and the Good Practices description will be sent to the project partners at least 15 days prior to each Study Visit in order to allow in advance to fully prepare for the exchange of experience while participating in the Study Visits exercise.

2.2 Site Tour

As project partners will already receive the site visit documentation in advance, the purpose of each visit will be to gather more detailed knowledge on the processes of interest for RECREATE, developed and implemented by SMEs (together with an on-site visit of SMEs), and the policies and tools developed and offered by the support environment.

Furthermore, in the case of visits to the SME sites, the project partners will have the opportunity to interact with the staff of the SMEs and, in this way, obtain additional relevant information to identify a possible transferability to their own regions.

To evaluate the different visits, project partners should use the report and evaluation of study visits (Annex I) created for this purpose. Internal evaluation will act as a support mechanism whose objective is to ensure good cooperation, high quality results and the orientation of project partners.

Annex I should be completed and returned to the organizing partner of the study visits no later than 15 days after the visit.

2.3 Workshop or Seminar

The study visit includes both a site tour and a meeting with local stakeholders.

Each partner, according to his needs and number of local stakeholders participating, shall decide the meeting's shape: it can be oriented toward the form of seminar, as academic and scientific information for professionals and SMEs. This can be replaced or accomplished through an ongoing workshop, where a group of local stakeholders engage in intensive discussion, taking the opportunity to explore the partners' innovations and practices.

The purpose of these meetings will be to highlight all lessons learned and exchange different points of views. It will also provide necessary inputs to guarantee high quality, effectiveness and efficiency of the policy learning exercise as well as generate new knowledge.

Each Workshop will evaluate the Study Visits previously carried out. At the end of the study visits, partners should be able to understand what elements of success are related to best practices that can be transferred to their regional context, as well as those that have selected SMEs and the support environment is likely to the actors face their process of boost their productivity and innovation.

3. Timetable

The formalisation of the learning framework includes the experience exchange activities and thematic workshops.

Five study visits, four thematic workshops and one 'ground testing implementation' interregional workshop will take place. This will constitute a policy workshop where the partners will implement a 'reality checking' of the recommendations with the stakeholders and policy makers.

RECREATE consortium has already pre-defined the stakeholders to be involved in the project. However, this list will be further enriched when the project starts. RECREATE's stakeholders will form 'Community of Interest' (COI) which will be expanded throughout the project. Their involvement is two-fold: they will be advising RECREATE consortium on main issues around the transport SME support eco-system but also they will be communicating to the consortium their vision for the region.

The programme of the study visit will be pre-set, following the study visit guide & template. In each territory the visit will be prepared through the following:

- previous regional meetings between the partner and main selected local stakeholders representing the quadruple helix,
- identification of best practices (each partner decides how many BPs to gather),
- an inventory of the regional policies.

On this basis, the partner will define the agenda and participants to the Study visit, both for the thematic workshop/seminar and visit to few selected SMEs.

An indicative list (but not limited to) of the topics to be addressed during the seminars/workshops is the following:

- Opportunities from new forms of transport, in particular aiming at removing the disability barriers;
- IP & commercialization;
- Financing innovation;
- Collaborations (joint ventures, technology transfer, European programmes participation)

The round of Study Visit needs at least a two days' work (including the Project Steering Committee). The participants will register in the Study visit Agenda uploaded in the partner's official website.

The regional community of interest involved in the preparatory activities will serve to disseminate the event - before, during and afterward - through their social media (twitter, facebook, etc). A Press Conference with the Regional Authority during the meeting shall be organized.

3.1 First study visits

The first study visit will take place in semester 2 and will be hosted by Campania Region PP2. The stakeholders will be:

Typology of stakeholders	General	Disabilities
Researchers	Riccardo Mercurio (Federico II University)	CNR_IRISS (through Roberto Formato)

Association	Unione Industriali, FCI (sustainable mobility)	(Romolo Capuano – FISH_federand, MOVI, DPI, etc...)
Business executives, represented by high technology districts and innovation intermediaries		
Qualified service groups	Giuseppe D'Angelo, Dattilo	
Transport planning authorities	Campania Region, Provincial Government	
Public transport companies, ports and airports authorities	ANM, EAV (public transportation), GESAC (Airport), Port Authority of Naples	
Private transport companies; companies	DHL, Bartolini group (logistics company)	
Sustainable mobility		Bike sharing, Bicycle House, Napoli Pedala
Sharing mobility agency		

The schedule of the study visit is reported hereafter.

The visit will consist of four days, with:

- the first committed to arrival;
- the second day focused on workshops, respectively “SMEs opportunities from new forms of transportation” and “SMEs opportunities from accessible transportation”;
- the third day committed to the steering committee and follow up (morning) and field visit.
- the fourth day committed to departure

Workshops will be attended by stakeholders from each Recreate Region. They will include:

- scenario introduction by Universities/Research Centre;
- case studies presentation by each partner.

The first workshop “SMEs opportunities from new forms of transportation” will discuss the foreseeable trends and opportunities of innovation in transportation relevant to SMEs.

The second workshop “SMEs opportunities from accessible transportation” will focus on accessible issues in transportation.

The field visit will be committed to best practices in Campania Region. The plan will be shortly defined in details.

A study visit report will be prepared by Campania Region and distributed to all stakeholders and project partners and to all members of the Community of Interest.

The agenda is defined as follows:

1st day – April 8th 2019 (Sunday)

Arrival at the airport of Naples

Dinner and accommodation in Naples

2nd day – April 9th 2019 (Monday)

Study visit in 5 selected PMI

Dinner and accommodation in Naples

3rd day – April 10th 2019 (Tuesday)

Location: Real Site of Carditello

9.00 – 13.00 **Steering Committee**

13.00 – 14.30 **Light lunch**

14:30-18:00 Conference

Opening Session

14.30 – 15.00 Project presentation

15 – 15.30 Transport policies of Campania Region

15.30 – 16.00 Study Visit Follow up

Workshop’s session

16.00 – 17.00 Two parallels workshops:

“SMEs opportunities from new forms of transportation”

“How Transport SMEs can innovate to satisfy fragile people’s needs”

Plenary session

17.00 – 17.30

Stay night in Caserta

Departure

3.2 Second study visit

The second study visit and thematic workshop will take place in semester 3 and will be hosted by PP5. Renowned experts in transport industry, governmental policies and business support advisers will be invited as guest speakers. The outline for the workshop will be prepared and will be discussed in prior with the steering committee over a teleconference. The seminar will be focusing on 'IP & commercialization', however, this might change based on the findings of the 'Transport SME Innovation' report (based on the SME needs) and suggestions by the Community of Interest. The findings of the report will also be presented in the seminar and will involve an interactive session with the stakeholders who will be encouraged to provide their views and feedback on the findings. At least one stakeholder meeting will be organized in each region.

3.3 Third study visits

The 3rd study visit and thematic workshop will take place in semester 4 and will be organized by PP1 in Coventry, West Midlands. The focus of the workshop will be on 'Financing innovation' which is the main support that PP1 provides to its customers as part of the business support portfolio of activities. The 'Transport SME Innovations' report will be also presented at the stakeholders and obtain their feedback on the findings. A study visit report will be delivered by PP1 straight after the visit.

During the visit in Coventry, the partners and stakeholders will have the opportunity to visit the establishments of world class transport research and development innovation infrastructure including Coventry University Technology Park, National Transport Design Centre, Manufacturing Technology Centre and MIRA. MIRA is a global provider of pioneering engineering, research and test services to the automotive, defence, aerospace and rail sectors which has also initiated the development of a new Technology Park where collaboration with SMEs is one of the top priorities. Key transport SMEs, identified during the good practice exercise, will be visited too.

Local transport SME innovation initiatives will be presented to the study visit members with the active support of Coventry City Council who is the Managing Authority of the ERDF

West Midlands has been instrumental in the development of schemes and measures to support SME innovation, so during the visit it is expected that the visitors will gain very significant experiences and be exposed to new ideas that could potentially be transferred in other regions too.

3.4 Fourth study visits

The 4th study visit and thematic workshop will take place in semester 5 and will happen in Vilnius, hosted by Lithuanian Innovation Centre PP4. The focus of the workshop will be on SME opportunities for 'Collaborations'(joint ventures, technology transfer, European programmes participation). This is one of the key areas of focus of the regional Operational Programme and is also very much in line with the SME needs according to many studies (eg INTRASME project findings, INNOTRANS, etc).

During the local meetings with the stakeholders, in this semester, the focus will be the good practice and the policy recommendations.

3.5 Fifth study visits

The 5th Study visit will take place in semester 5 and will be organised by PP3. Alongside this, the interregional policy workshop will take place in Rhodes, Greece, and will be attended by members of the Community of Interest group. The aim of the workshop is to present to the participants the results on Good Practice but also some initial thoughts on the policy recommendations. The main aim of this ground-testing implementability workshop will be to perform a reality checking on the main recommendations. It will be a small scale focused workshop with ca 15-20 participants.

The experts will be asked to evaluate the generic policy recommendations developed and re-assess the generic elements – features identified for overall value creation of SME support investment in transport. The participants will be from academia, industry and policy makers. Participants will be encouraged to engender collaborative reflection by a structured process of sharing their ideas. The participants will be also asked to test, check and sharpen the practical relevance of the suggested Action Plans. The approach to be used in this workshop is the 'design scenarios' where participants will be encouraged to provide solutions (roadmaps) to address the challenges identified in transport SME competitiveness. Advanced brainstorming techniques will be used to enable creative thinking and increase the number and diversity of new ideas.

The main organizer of the workshop will be the South Aegean Development Agency, however, PP1 will very actively contribute in the preparation due to its very extensive experience in event facilitation but also thorough understanding of the transport SME sector.

3.6 Calendar of the Study Visits

Partner's name	Dates	Places
LP: Coventry University Enterprises Ltd (UK)	April 2020 (TBC)	Coventry
Campania Region (IT)	8 th -11 th April 2019	Carditello (CE) and Naples
Development Agency of South Aegean Region – READ S.A. (EL)	April 2021 (TBC)	Rhodes
Public Institution Lithuanian Innovation Centre (LT)	October 2020 (TBC)	Vilnius
Regional Development Agency South-West Oltenia (RO)	October 2019 (TBC)	Craiova

4. Monitoring & quality control of the process

The methodology presented above also includes the monitoring of the whole exercise.

Monitoring is important to understand it as a continuous and dynamic process. Planning and monitoring are closely interlinked as planning sets the course and monitoring ensures that things stay on-course.

To guarantee a proper monitoring it is necessary to set up an Effective Feedback Mechanism by applying a Resulted Oriented Monitoring approach. In practical terms this means the monitoring activity is mainly focused on the final outcome of study visits round.

The elements that will be taken into consideration to verify whether the visits are in line with the expectations are:

- **Relevance** which describes how well the study visits addresses a real problem of the receiver and how well it matches with the regional strategic objectives.
- **Efficiency** that stands for how well the inputs are transformed into outputs and outcomes. (Gap analysis and adaptation plan).
- **Effectiveness** that measures the degree to which the study visits outputs provided benefits.
- **Impact** that describes how and to which degree the study visits have contributed to the solution of the problem and to the achievement of the overall objective.

All evaluation modules will be collected (Annex) and will prepare a quality monitoring and synthesis with general conclusions on study visits.

References

RECREATE Application Form PGI05275 Version Number: 5

Annex1: STUDY VISITS REPORT & EVALUATION

Date:

Partner author of the report:

Name of the Good Practice:

Owner of the
GP:

Country:

Brief description of the organization and services/strategies/actions/etc. carried out regarding productivity, competitiveness, growth and innovation increase.

Statement	Strongly disagree	Moderately disagree	Neutral	Moderately agree	Strongly agree
The selection of this entity as Good Practice was adequate					
Site Visit documentation facilitated before the Study Visit was suitable and reliable					
A clear purpose of the good practice was conveyed					
Organization of presentation was appropriate					
Presenter pointed out the main characteristics of the good practice					
Key objectives of the good practice were presented and supported with actual facts					
Course of actions for implementation of the good practice was appropriately proposed					
Information about the potential assistance in implementation of the good practice was given					
The supporting material was relevant and up to date					
Questions to entity staff were answered accurately, clearly and effectively					
Concluding remarks were efficiently presented					
The length of the Site Tour was appropriate					
Success factors suitable to be transferred were clearly identified					
Barriers to productivity, competitiveness, growth and innovation increase were identified					
Concluding remarks were efficiently presented					
The Study Visit has met the stated objectives fully					
The general organization of the Study Visit was well-coordinated					

Key issues of the site visit	
Please describe the success factors identified in the site visit:	
Please describe the barriers to productivity, competitiveness, growth and innovation identified in the site visit:	

RELEVANCE OF THE GOOD PRACTICE UNDER THE FOLLOWING SUB-THEMES	RELEVANCE			
	Very relevant	Relevant	Partly relevant	Not relevant
Leadership, organization and management of increase of productivity and innovation policies				
Opportunities from new forms of transport				
IP & commercialization				
Collaborations (joint ventures, technology transfer, European programmes participation)				
Training, human resources needed for productivity and innovation increase				
Financing innovation				
Other (please specify)				
Please justify				

TRANSFERABILITY POTENTIAL OF THE GP		
Transferability Aspects	Recommended strategies (pathways) to achieve the transferability	Specific actions recommended to be implemented within each strategy

RECOMMENDATION		YES	NO
Good practice should be selected for the GP Handbook			
Reasons for decision:			

How would you rate the overall presentation of the good practice?

1	2	3	4	5
Not very successful	Could be better	Average	Quite good	Very good

If there is any particular observation you wish to make about the presentation that is not covered above, put the details in this box.

Partner: _____

Author: _____