

D.T1.4.1 COACHING GUIDANCE ON IMPACT CONTROLLING FOR THE INVOLVED CAMI4.0 STAKEHOLDERS

A deliverable related on impact controlling for the involved CAMI4.0 stakeholders in WPT1	Final	Version
		4.1
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10.06.2020	2.0	KPT	Second issue, with updates from Lead Partner & LP Feedback
15.06.2020	3.0	all	Third issues, the Full Partnership for final review and formal issuance
26.06.2020	4.0	all	Fourth issue, Final Version.



1. Executive Summary

1.1. Project Overview

CEUP 2030 aims to generate stable innovation networks which foster better understanding on Central Europe Advanced Manufacturing and Industry 4.0 (“CAMI4.0”) topics, to generate improved knowledge resource exchange on these technologies leading to an upgraded framework for policy-making and implementation.

Ultimately CEUP 2030 creates and tests a common method to promote improved knowledge dissemination to policy-making stakeholders using a collaborative exchange framework based in physical and digital-methods. These methods and the technology show-cases disseminated within these method structures are harvested from existing, high-quality innovation know-how in the CE area.

The project focuses on:

- Identifying the highest-quality innovation know-how in the CE Area, on the CAMI4.0 Topics.
- Enhancing skills capabilities and knowledge of people in charge of local, regional, and (trans)national RTI Policies, associated to the CAMI4.0 Topics.
- Creating a sustainable structure for awareness-raising and shared-sustainable RTI knowledge resource use to enhance policy decision support.
- Anticipating and fast-tracking policy / strategy policy pilot actions to promote a joint RIS3 for CAMI4.0 Excellence in CE/EU.

1.2. Main project results

The main results of the projects are the 6 outputs contributing to the result indicator by setting up a stable network for trend monitoring on CAMI4.0 topics as well as the RIS3 Round Tables both fostering innovation in a regional and transnational context. For immediate cooperative innovation learning, the Policy Learning Labs & the Tech Radars/PID fit to the indicator. For a mid-term and long-term anchoring, the Strategy & Boost and the Policy Framework for 2021-2027 also contributes. The expected change at the territorial level will be noticeable by aligning structures & processes for a stable, future robust tech & innovation policy implementation scheme lasting far beyond project’s end & by integrating consequently stakeholders across Europe for strengthening CE. CEUP 2030 improves the situation of target groups through a deep-dive integration in both working group structure (TIN, RIS RT) & in the cooperative learning of the PLLs. This is valid for the TGs involved & for further future stakeholders like e.g. EGTCs Eucor (DE, FR, CH), Alpmad (IT, FR) where the partners (SIIT, KIT) are the driving forces. In general, the project assures sustainability of outputs/results during project duration by the number of involved top level stakeholders & proven quality of PPs and their ASPs. After project’s end there will be an agreed capitalization agenda & a long-term validity stated in the Policy Framework 2021-2027 (political) and the subsequent action plan (financial). PLLs, TINs & RIS3 RTs will stay as network organizations from the triple-helix stakeholders (institutional). The outputs/results of CEUP 2030 can & will be transferred to additional target audiences/territories during project lifetime anyway (e.g. TIN/PID/PLL on 5 conferences, using 3 EU Presidencies, working groups from DGs, Vanguard, EFFRA, etc.). Also, beyond CEUP 2030 it is planned and will be agreed to foster a strong transfer scheme (Policy Framework 2021-2027).



1.2.1. Work Package Overview

The overall objective of WPT1 links to the project's specific objective of enhancing skills, capabilities and knowledge of people in charge of local, regional and (trans)national Research, Technology and Innovation policies within the triple-helix context.

The challenge manifests in two sub-objectives which are:

- (1) To train and empower people to work in the environment of new technologies (strategically and operatively) regarding policy-relevant decisions
- (2) To pool a critical mass of trained stakeholders to generate sufficient power for policy-making and appropriate selection, adaption and fine-tuning of already proven tools, instruments and methodologies.

This leads to some very practical activities:

- the appropriate selection, adaption and fine-tuning of proven tools, instruments and methodologies, aka "Harvesting" - during A.T1.1
- The appropriate definition of the four technology topics for Central Europe Advanced Manufacturing & Industry 4.0 (CAMI4.0) - during A.T1.1
- The generation of a structure (the Policy Learning Lab) where stakeholders get acquainted with new technologies and their applications, so as to give them better context for future decisions- during A.T1.2
- The implementation of the PLL where complex technologies are explained in a practicable, understandable and time-optimised way - this should be mutual, triple-helix learning (policy, research and business) with on-site demonstration, i.e. live demos inside factories; learning connected with virtual & augmented reality, etc - during A.T1.2
- The generation of a common strategy, based on previous work of Partners, to set a vision for the four CAMI4.0 topics - during A.T1.3
- The generation of a common action plan, based on the previous work of Partners & PLL engagement, to set a critical path for the four CAMI4.0 topics - during A.T1.3
- The generation & implementation of a framework to gain 360-degree feedback from stakeholders on the methodology of collective exchange during PLL aka "Impact Controlling" - during A.T1.4

1.2.1.1. Main Outputs in WPT1

In WPT1 are two main Outputs:

1. **OUTPUT1 - CEUP 2030 Policy Learning Lab**
2. **OUTPUT 2: CEUP 2030 Strategy Upgrade & Boost**

OUTPUT1 - CEUP 2030 Policy Learning Lab, consists of three major parts.

This output describes the physical structure which will be created and deployed by each partner to train and empower policy-relevant stakeholders on the CAMI4.0 Topics, to generate sufficient knowledge exchange to support policy-making. This output has a number of parts which must be achieved for it to be considered "complete".

After each session of PLL, first round of PLL (due in August 2020) and second round of PLL (due February 2021) PPs will complete a detailed interview scheme with identified Peer Reviewers, to ensure the methodology structures are useful. This 360-degree feedback should be used to improve the deployment techniques and technology use-cases which are delivered.



<p>Output O.T1.1</p>	<p>CEUP 2030 Policy Learning Lab – Cross-linked capacity enhancement for CAMI4.0 stakeholders</p>	<p>The CEUP 2030 PLL is established by 10 trainings (A.T1.2) to train and empower people to work on policies & strategies for CAMI4.0 technologies (mutual Triple-Helix-Learning). The PPL fosters & anchors a policy training scheme where comprehensive learning processes are designed to be felt & understood quickly. Complex systems and technologies are made clear and understandable to target groups. The gained 100 stakeholders set the base for strong CE/EU policy making in T2 & T3.</p>	<p>S.O.1.1 / S.O.1.2 - Number of trainings implemented for improving innovation capacity and mind-sets</p>	<p>1,00</p>	<p>02.2021</p>
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OUTPUT 2: CEUP 2030 Strategy Upgrade & Boost

This output describes the development of a Strategy & Action Plan which sets the vision and working plan for the Trend and Innovation Networks (“TIN”) for CAMI4.0. The output consists of two parts:

Part 1 = The Joint Strategy for CAMI4.0 Excellence, which sets strategic vision statements from each PP on the CAMI4.0 Topics. The vision should emerge from harvested strategies which the PPs have worked on this programming period, plus the feedback and insight gained from stakeholders during the PLL implementation. The latter aspect the “feedback and insight” are what represents the “Upgrade & Boost” element of this output.

Part 2 = The Action Plan for CAMI4.0 Excellence, which sets a structured working module for the 4 CAMI4.0 Topics. This Plan should identify the policy pilot actions, aka policy instruments for CAMI4.0 which PPs current have experience with, that will be the base of discussion in the RIS3 Round Tables (WPT3).

<p>Output O.T1.2</p>	<p>CEUP 2030 Strategy Upgrade & Boost – Fostering straight implementation among CE/EU project scheme</p>	<p>The Strategy Upgrade & Boost connects the lessons learnt from the PLL with an appropriate new joint improved strategy supported by a policy implementation action plan (A.T1.3). Thus a policy relevant exploitation of the CE/EU project scheme is set for an immediate use and in a long-term strategic manner. This will be further enhanced in T2 & T3. First CE/EU policy anchor will be set during EU Presidency of Croatia, continued during the PPs countries Presidencies of Slovenia & Germany.</p>	<p>S.O.1.1 - Number of strategies and action plans developed and/or implemented for strengthening linkages within the innovation systems</p>	<p>1,00</p>	<p>02.2021</p>
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1.3. Outputs WPT1 Impact Controlling

In WPT 1 Impact Controlling (AT1.4) there are tree outputs:

Outputs: WPT1 Impact Controlling (02.2020)

<p>1. Coaching Guidance on Impact Controlling for the Involved CAMI4.0 Stakeholders (PTP) [04.2020]</p>	<p>Design of WPT1 impact controlling system, linked to global impact controlling scheme</p> <p>Includes guidance on engaging peer reviewers (3/PP), process and timeline for engagement in WPT1, qualitative and quantitative indicators which will be compared.</p> <p>1 IT-based handbook on all the above points, including interview consolidation templates.</p>
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2. Interim Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost (PTP) [09.2020]	Specific feedback from a select Peer Reviewer (1 interview/PP), on an analysis and update recommendations for second PLL in practice and first insights on the strategic vision for CAMI4.0 Excellence.
	One contribution from each PP (1 Sub-Report/PP) based on PP's qualitative and quantitative data from first stakeholder interview.
	1 consolidated report, which brings all PP reports together, and draws common conclusions.
3. Final Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost (PTP) [02.2021]	Interviews (2 interviews/PP - with different 2 peer reviewers), on the impact of WP1 (PLL specifically) at enhancing skills, capabilities and knowledge of people in charge of local, regional & transnational RTI policies, in a triple-helix context.
	One contribution from each PP (1 Sub-Report/PP) based on PPs qualitative and quantitative data from second and third stakeholder interview.
	1 consolidated report, which brings all PPs report together, and draws common conclusion over the success of the engagement model presented in WPT1.

1.4. Impact Controlling System Overview

Impact Controlling System is a cross cutting activity where partners work together to determine a methodology and associated tools to monitor and measure the impact that the project has made on meeting its objectives. The developed methodology is a combination of qualitative and quantitative attributes which will be assessed across the lifecycle of the project.

Qualitative attributes are a series of questions that can be asked to a chosen group of Peer Reviewers, across the project's development; whilst **quantitative attributes** are based on project numerical indicators that are associated to connecting with Target Groups generally, and meeting content-relevant deliverables on a work package by work package basis.

The methodology is accompanied by an in IT based tool, in the form of a group-accessible Excel sheet, which can be used to track and update information from Partners and their peer reviewers about the impact of the project on reaching its desired goals.



1.5. Call to Action Overview

There are a number of outputs that the Project Partners are required to deliver as a part of the Impact Controlling Methodology Development and the implementation of the Monitoring Impact Assessment Tool.

Required Output	No. of Outputs Per Partner	Required Delivery Date
All Partners identify Peer Reviewer for CEUP2030	Min. 3 different stakeholders for Peer review	20 June 2020
All Work Package and Deliverable leaders identify the quantitative indicators.	Unlimited	20 June 2020
All Partners complete 1 st Peer Reviewer Interviews asking (qualitative) questions about the CEUP 2030 project as a whole, and about the Policy Learning Lab and Strategy Upgrade & Boost - Input for D.T1.4.2 (ANNEX 1)	Min. 1	31 August 2020
All Partners complete within 1 st PLL evaluation questionnaire (10 completed questionnaires) (ANNEX 3)	10	31 August 2020
All Partners send the summarized answers of their Peer Review Interviews to PTP	Min. 1	7 September 2020
Follow-up interviews (after overview of all outputs from WPT1- Input for D.T1.4.3 (ANNEX 2))	Min. 2	25 January 2021
All Partners complete within 2 nd PLL evaluation questionnaire (10 completed questionnaires) (ANNEX 4)	10	25 January 2021
All Partners are asked to update their WPT 1 and WPC Lead, regarding the Impact Controlling Monitoring Tool, with the summarized answers to the quantitative indicators.	All Indicators	25 January 2021

1.6. Scope of Document & Summary

This document contains a design of the Coaching Guidance on Impact Controlling for the Involved CAMI4.0 Stakeholder and provides the work package deliverable responsible and the PPs information about the impact controlling system and process which will be in place for the duration of WPT1. It should be a mandatory read for all PPs in CEUP 2030.

1.7. Audience

This document is directed at all project partnership members, because all members of the partnership should participate in WPT1 ideation and implementation. It should be considered an internal document, and the appropriate status should be reflected in the “Dissemination Level” table.



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2. Introduction

The purpose of this document is to set a design and the key processes for the Impact Controlling (IC) of WPT1. The handbook explains:

- the impact controlling system and process which will be in place for the duration of WPT1,
- the interview scheme obligations (event survey and peer to peer interviews) to create the summarized evidence of the peer review interview and which tool to use for the scheme;
- sets the deadlines to run evaluation and interviews to meet the summarized evidence requirements in advance of the Interim report deadline and Final report deadline.

The methodology should link nicely to the global impact controlling scheme, and should look to answer the key questions highlighted in the AF:

- 1) Gain insight on the PLL operational framework and content, whilst early insight into the strategic vision for CAM4.0 Excellence
- 2) Gain insight on how the work package's structure enhances skills, capabilities, knowledge of people in charge of local, regional, and (trans)national RTI policies in a triple-helix context.

Within the project PTP is in charge of the design of an IT based Impact controlling system including a peer review interview scheme.

2.1. Personal background in impact measurement

Pomurje Technology Park (PTP) has extensive experience in the preparation and implementation of directly managed EU projects in several EU programs, as a lead partner also in Interreg CE program and thru projects we did a lot of monitoring. PTP has a strong capacity base of 12 qualified and experienced persons working in EU projects, with knowledge of foreign languages and minimum university degree. PTP developed its own software program adapted for the management of EU projects which unthinkable increase productivity and quality of work and supervision of work, especially when several EU projects were under the implementation at the same time. We conducted research to identify methodologies, survey tool, and stakeholder surveys/indicators.

2.2. What is impact controlling?

Impact controlling, or more commonly known as impact monitoring, is a system and or a set of procedures which can be used to measure whether a project or task has reached its intended goal, or is on track to reaching its goal. It can be succinctly defined as a continuous process of collecting data on specified indicators.¹

2.3. What is a peer reviewer?

Peer Review is defined as “a process of subjecting an author’s scholarly work, research or ideas to the scrutiny of others who are experts in the same field”²

A peer reviewer is a term which has emerged from academic/scientific writing, which refers to an individual or organization whose goal is to assess the validity, quality and often the originality of an article (or a concept in an article). This term can be similarly assessed in the project world, where an individual or organization will be assessing the validity and quality of the project’s goals

¹ “What is Impact?” in the Danish Demining Group’s “An introduction to Impact Monitoring” available at: http://danishdemininggroup.dk/media/1220258/im_manual_2012_web.pdf

² What Is Peer Review? (2014). Int J Comput Appl. Web. Retrieved July 02, 2014, from <http://www.iicaon-line.org/peer-review> [Google Scholar] [Ref list]



and provide qualitative feedback on the group's ability to achieve the goals with the project's outputs.

2.4. CEUP 2030 Requirements related to Target Group

The selected institutions, organizations, companies should contribute with a high impact to the project implementation and their capitalization, strategic anchoring as well as to a high-quality communication of gained project results. At the same time note these indicators again at impact monitoring of quantitative indicators (point 3.6)

- Local public authority - 20
- Regional public authority - 20
- National public authority - 7
- Interest Groups, including NGOs - 10
- Higher education and research - 30
- Education/training center and school - 10
- Large enterprises - 20
- SME - 80
- Business support organizations - 20

While implementing WPT1, Partners should carefully consider how to identify and involve them to add value to each project activity,

Target Groups can, and should be included in project content work (such as attendees at PLLs or included in your strategic Action Planning process), as Peer Reviewers, and as general attendees at workshops and strategic alignment activities. They are counted institution by institutions (each institution should count once - not on a person by person basis!)

Target group	Please further specify the target groups see examples in annex 4 of the application manual (classification of target groups)	Target value Please indicate the size of the target group the project aims to actively involve
Local public authority	Local & municipal authorities, associated to innovation & technology support initiatives will be engaged in the project 10 from PPs area and 4 further 10 from complementary areas (e.g. Gric, Siedburg, Brandisau, Brno, Jena)	20,00
Regional public authority	Regional ministries of economic technology, innovation & industry will be engaged from 10 PPs regions + 10 further regions which provide critical synergy to promote the CEUP 2030 Framework of Excellence vision (e.g. Styria, Thüringa, South Tyrol, etc.)	20,00
National public authority	National ministries or designated & policy-relevant agencies will be involved from PPs associated country. Focus will be on incorporating National ISI coordinating initiatives, leveraging off of engaged Associated Partners.	7,00
Interest groups including NGOs	Via Members, Owners & founders of PPs Interest Groups will be brought into the partners (approximately 10 PPs). Interest groups engagement deeper understanding about impact on industry/technology innovation generally.	10,00
Higher education and research	The target HEAR, innovation to promote the PID & TNS become more future forward oriented. Critical connections with this Target Group is key, therefore each PP engages 3 from their networks to enhance thematic discussions within or next the topic.	30,00
Education/training centre and school	Each PP will identify one ETCES to support interactivity & sustainability of PID tool use, focusing on an integrative approach which connects to training centres to promote interdisciplinary teaching methods for the four topics.	10,00
Large enterprises	LEs will be involved, especially through use case development & to showcase practical relevancy industrial impact from these target technologies (Each PP engages 2 LEs, gaining a collaboration loop in Robotics, Materials, Big Data/Sensors & AI).	20,00
SME	SMEs, especially those within PP networks, will be included to showcase practical relevancy of targeted growth support mechanisms associated to the technology areas (Each PP engages 4, approx. 2 with a business model/tech area).	80,00
Business support organisation	PPs & networks engage regularly with BSOs (technology parks, clusters); these multiplying organisations will be involved in TN discussion & further in RIS3 Roundtables. PPs each bring 2 BSOs into the CEUP 2030 activities.	20,00

Figure 1 Target Groups of CEUP 2030
 (Source: AF, 2018; pg 63)

2.5. CEUP 2030 Requirements related to Thematic Result Indicators

Thematic Result Indicators are relevant for the full project. However, there are contributions to these indicators through the thematic work in the project's work packages. The following thematic result indicator should be monitored whilst implementing WPT1 Once again, note this indicator again at impact monitoring of quantitative indicators (point 3.6):

Number of trained persons	Persons	100,00	Through the Policy Learning Labs (WPT1), collaborative learning techniques will be used to upgrade and upstream technology focused results to policy-relevant users (10/PP - 100 total); these users will be engaged again once tools are further developed & upgraded (WPT2), and policy-relevant stakeholders are brought into the RIS3 Round tables to determine implementation alignment steps for the Framework for CAMI4.0 Policy Excellence.
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These stakeholders will be policy-relevant individuals working for critical organizations which have influence on the regional, national and transnational development of CAMI4.0 topics (from public authorities to interest groups/NGOs with key influence over advanced manufacturing / industrial digitization or Industry 4.0).



2.6. Agreeing some guiding principles

It is useful to develop some guiding principles to ensure that impact controlling is relevant, useful, timely, and credible. Some examples might include making sure the IC and/or information you collect is:

- **focused and feasible** in relation to your available resources so that it supports rather than diverts resources from action (i.e. make sure you focus information collection on what you ‘need to know’, not on what would be ‘nice to know’);
- **useful and timely** information to improve group learning, group decision making, and project design;
- **useable** by, and/or comparable to, data collected by other stakeholders so it contributes to the wider evidence base;
- **credible, valid and reliable** to the extent possible within your available resources;
- **ethical** e.g. in relation to data consent and protection.



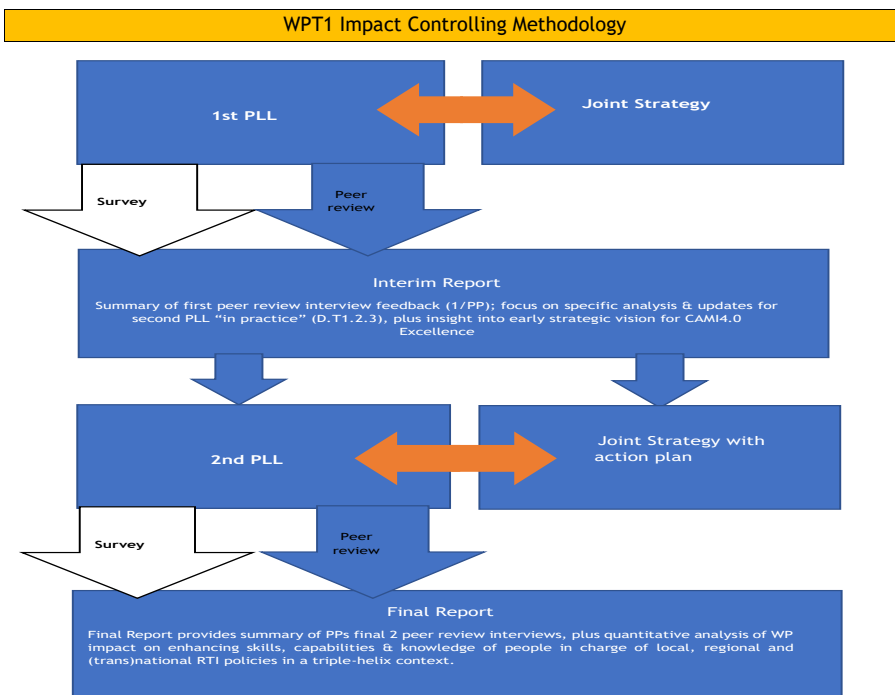
3. Methodology

The purpose of this section is to describe the methodology for Impact Controlling Generally, and then specifically detail the procedures for WPT1 Impact Controlling, which includes qualitative and quantitative characteristics during data results processing. It will detail the:

- Concept
- Preparation Steps
- Data Collection Procedures
- Data Evaluation and Processing Procedures

3.1. Concept

The diagram below offers a simple way to understand this definition of impact. Note that impact is not only what changes (the outcome) but the difference between the change and what would have happened anyway (in the absence of the entities activities).





3.2. Preparation Steps

To prepare an interim and final report for impact controlling we need to collect:

Quantitative information expressed in numerical terms as numbers and ratios for example. This information will allow you to answer 'what', 'how many' and 'when' questions.

Qualitative information is expressed through descriptive prose and can address questions about 'why' and 'how', as well as perceptions, attitudes and beliefs.

At the end of the workshop in the Policy Learning Lab, we will collect quantitative data with a questionnaire (10 questionnaires in 1st PLL, and 10 questionnaires in 2nd PLL).

Qualitative information will be collected through interviews at the end of each Policy Learning Lab (min. 1 PR after 1st PLL and min 2. PR after 2nd PLL).

3.2.1. Participants in Policy learning lab and external Peer Review Identification

The policy learning labs will engage at least 10 stakeholders per partner (10/PP - 100 total), in collaborative learning techniques.

Each PP is asked to identify minimum three (3) individuals in **different** organisations, from a balanced representation of the project's target group stakeholder organisation types.

As a reminder these target group types are as follows:

- Local Public Authorities
- Regional Public Authorities
- National Public Authorities
- Higher Education & Research
- Education / Training Center and School
- Large Enterprises
- SME
- Business Support Organisation

For the best inputs by preparing the main outputs, it is important that the stakeholders involved in PLL and Peer reviews are:

- policy-relevant individuals
- working for critical organizations
- have influence on the regional, national and transnational development of CAMI4.0 topics
- are coming from public authorities, but can also coming from interest groups/NGOs
- have key influence over advanced manufacturing / industrial digitization or Industry 4.0

These three (3) individuals will complete an interview with the PP, so ensure the choice of Expert Peer Reviewer is someone who brings added-value to the project's development. Each PP is free to choose the experience "type" that this external Expert Peer Reviewer brings to the Partnership.



Table 1 Table for identify potential persons for peer review

	Project Partner n.				
	Peer 1 - 1 st PLL	Peer 2 - 1 st PLL	Peer 3 - 2 nd PLL	Peer 4 - 2 nd PLL	Peer 5 - 2 nd PLL
Institution name					
Region					
Type of organization					
CAMI 4.0 related topics					
Planned Date for PR					
Name					
Address					
E-Mail					
Position					

Responsible for the impact controlling (PP8) will upload the Excel table into the Alfresco. Each PP must insert potential interviewees into the table. Because of objective and subjective reasons, potential proposed peer reviewers are not binding (you can change it over the course of the project according to the context)!

3.2.2. Online survey preparation

For Final Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost (D.1.4.3) we need input of quantitative data for quantitative analysis of WP impact on enhancing skills, capabilities & knowledge of people in charge of local, regional and (trans)national RTI policies in a triple-helix context. So, it would be necessary to collect this data from participating stakeholders in 1st and 2nd PLL (ANNEX3 and ANNEX 4).

The frequency of use is a good indicator of their accessibility, transferability, usability, relevance, cost-effectiveness, and so on. These results can be used as “proof” for policy-makers that the specified goal for the target group can be achieved.

3.2.3. Interview Preparation (Peer Review)

Each prepares for an external peer reviewers meeting. A recommended set of materials it may be beneficial to have in advance of these meetings include (Annex 3 and Annex 4):

- Short description of the project’s key vision & objective
- Short description of the impact controlling’s key goal
- Short description of the WPT1 Outputs



All PPs in this project are experienced at Peer Review procedures, however, please consider briefly the importance of creating a two-way conversation (not just drilling questions at the evaluators).

Create a natural conversation, and allow the conversation to touch on the project outputs of WPT1 within a wider contextual discussion:

“Does CEUP 2030 generate stable innovation networks, foster a better understanding & generates improved knowledge & exchange on new technologies relevant for Central Europe Advanced Manufacturing & Industry 4.0 (CAMI4.0)? Does it foster the exploitation & upstreaming of available outputs/results, leading to an upgraded framework for policy-making & implementation?”

“Have the skills, abilities and knowledge of the people responsible for policies improved within the triple helix?”

1st Peer review (ANNEX 1) should focus on specific analysis & updates for second PLL “in practice” (D.T1.2.3), plus insight into early strategic vision for CAMI4.0 Excellence. For preparation of D1.4.2, we need the following answers to the questions:

- How relevant and effective is the Policy Learning Lab (OT1.1.) to reach the project’s wider aims & objective? What would you change?
- Could the content be quickly felt and understood? What would you change? What would you change?
- **What topics of CAMI 4.0 is appropriate for our region and what are its limitations?**
- Was the learning process have been designed so that he can be quickly felt and understood. What would you change?
- What are the strengths, weaknesses, and where do you see the opportunities and potential challenges in Industry 4.0 in your region and country?
- **Where do you want to see your region, country, related to CAMI 4.0?**
- **How can the Policy Learning Lab (OT1.1.) create value for our region’s key stakeholders?**
- **How can Strategy (OT.1.2) and the development of dedicated actions to promote policy-instrument development to support these CAMI4.0 Topics, create value for our region’s key stakeholders?**

2nd Peer review (ANNEX 2) should focus on both outputs and on impact on enhancing skills, capabilities & knowledge of people in charge of local, regional and (trans)national RTI policies in a triple-helix context. For preparation of the D1.4.3, we need the following answers to the questions:

- Was the content understandable? What to change and why?
- Has the learning process been designed so that it can be felt and understood quickly? What would you change and why?
- How relevant and effective is the Policy Learning Lab (OT1.1.) to reach the project’s wider aims & objective? What would you change?
- How relevant and effective is the Strategy with action plan (OT1.2) to reach the project’s wider aim & objectives?
- Whether the lessons learned from the PLL were linked to the corresponding new joint improved strategy, supported by a policy implementation action plan. **What are your recommendations to better target & formulate actions to deliver support for the CAMI4.0 Topics ?**
- How can the Strategy and action plan (Ot1.2) results be used to support other RIS3? Or Other Initiative(s)?
- How can the PLL (Ot1.1) results be used to support other RIS3? Or Other Initiative(s)?

[SH1] megjegyzést írt: My view is that it does not need to be a „must” if you are already collecting information on how to improve the PLL within the questionnaire.

I think it would be valuable for all PPs to not feel like they “Must” talk to their peer reviewers about anything except for reaching the wider strategic aim of the project (aka getting stakeholder buy-in for policy pilot action development).

However – I do like that we give PPs guiding questions in the Annex, but I think we should allow the PPs to create whatever conversation they want with their Peer Reviewers to judge real impact of the strategic intent of the project.

I’ve highlighted the principles I think are REALLY essential, and added to a question.

[JŠ2] megjegyzést írt: Please also consider issues that would be relevant to your input-s

[JŠ3] megjegyzést írt: Please also consider issues that would be relevant to your input-s



- How can the PLL (Ot1.1) support other RIS3 work? Or Other Initiative(s)?

3.3. Data Collection Procedures

3.3.1. Period of Data Collection

Each PP collect data from participants after 1st PLL and 2nd PLL (closed-ended and semi-closed-ended **survey questionnaire**; ANNEX 3 and ANNEX 4) and from chosen **Peer Reviewers** after 1st PLL and 2nd PLL

Rules of appointment setting and timing:

- Survey questionnaire of 1st PLL participants must be done until 31 August 2020
- Survey questionnaire of 2nd PLL participants must be done until 25 January 2021
- 1st Peer Review Meetings must take place before 31 August 2020.
- 2nd Peer Review Meetings must take place before 25 January 2020
- The survey questionnaire will be completed via an online survey questionnaire. In case the participants fill in the survey questionnaire at the workshops on paper, you have to enter it manually in the online survey questionnaire.
- Peer Review meetings can take place over Skype and/or Telephone, but it is most recommended that they occur face-to-face, when possible.

3.3.2. Data Collection Steps (Online Survey)

- Before starting the workshop, consider how the participants will complete the survey (in physical form (paper - print out Annex 3 and Annex 4)) or online (see links below).
- After the PLL workshop you must invite participants to fill out survey online survey. There are two ways to invite your participants in the Policy learning lab to participate in the questionnaire.
 - a) You can send a link to survey to your participations on PLL by email, SMS, Viber etc.
 - b) Another way is for the participants to fill in the questionnaire by hand at the end of the workshop, which you print out. You then enter the collected data in the online questionnaire.
- The data for quantitative analysis will be collected in a web cloud of Google forms (link:
1st PLL <https://forms.gle/KnYPVEAb59w1WR3o9>
2nd PLL <https://forms.gle/aEN2aDTUSHFaf4BW8>



- **Gather responses.** It is important that we (PTP) monitor response rate. Final sample size will depend on how many participants complete survey. Way of increasing the response rate of your survey is by promising to share the results with your participants. The best way is to ask participants to immediately fill out a workshop questionnaire over the phone, laptop, tablet, or to have them prepare physical questionnaires for them.
- **Analyze the results.** PTP will visualize collected data by presenting the results in charts and graphs. With online surveys the gathered data is stored automatically, so you can start analyzing the results straight away. We will see preliminary results when the survey is still open.
- **A report.** Two reports for impact controlling are envisaged in WPT 1, namely
 - a) Interim Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost which provides summary of first peer review interview feedback (1/PP); focus on specific analysis & updates for second PLL “in practice” (D.T1.2.3), plus insight into early strategic vision for CAMI4.0 Excellence, and (September 2020)
 - b) Final Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost which provides summary of PPs final 2 peer review interviews, plus quantitative analysis of WP impact on enhancing skills, capabilities & knowledge of people in charge of local, regional and (trans)national RTI policies in a triple-helix context (February 2021)

The final step in conducting online surveys is to write a report explaining our findings and whether they have met our research goals. A successful survey will provide reliable answers to the questions we had. Allowing us to take data-driven actions based on hard evidence. Used correctly online surveys can effectively measure participants in PLL satisfaction, get feedback, and reveal key influences in our area of research.

3.3.3. Data Collection Steps (Peer Review)

- Each meeting can last from 30 minutes to one hour, but there is no restriction on how long the conversation may last.
- PPs should provide context for the interview, before arriving (for instance, by sending a brief description of the project) or you present briefly on meeting.
- PPs utilize the Interview Guide, found in the Annex of this document, to guide the critical evaluation conversation.
- PPs are to record clearly written and/or typed notes, into the “Interview Guide Template” associated with the conversation. NOTE: PPs can choose to voice-record or film the conversation (for instance, to support WP Communication /online content development), but Informed Consent must be gained for this data to be collected by the PP.
- Once the PP has completed external Peer Review meeting (after 1st PLL **one Peer review until 31 August 2020**, after 2nd PLL **two more PRs until 24 June 2020**), they upload the transcript to their respective CEUP folder (1st peer review in folder 1.4.2 and 2nd Peer review in folder 1.4.3) in Alfresco, within the project’s cloud space.
- PPs are asked to ensure that the uploaded Template is legible and in English, so common data processing can occur, seamlessly.
- Please use the **attached xls-table**. In total we will use this information:



	Project Partner n.				
	Peer 1	Peer 2	Peer 3	Peer 4	Peer 5
Institution name					
Region					
Type of organization					
CAMI 4.0 related topics					
Date					
Duration					
Name					
Address					
E-Mail					
Position					
Question 1	Answer 1				
Question 2...	Answer 2				



3.4. Data Evaluation & Reporting

Once all interview transcripts and online survey are received, the evaluation of the data begins. This process will be completed by Pomurje Technology Park, the responsible partner for:

- a) **D.T1.4.2** Interim Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost which provides summary of first peer review interview feedback (1/PP); focus on specific analysis & updates for second PLL “in practice” (D.T1.2.3), plus insight into early strategic vision for CAMI4.0 Excellence, and (September 2020)
- b) **and DT.1.4.3** Final Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost which provides summary of PPs final 2 peer review interviews, plus quantitative analysis of WP impact on enhancing skills, capabilities & knowledge of people in charge of local, regional and (trans)national RTI policies in a triple-helix context (February 2021)



4. Next Steps

Activity	Summary	Deadline	Responsible partner
Feedback on IC Methodology	Each PP will provide feedback on the Impact Controlling Methodology	17 June 2020	ALL
Incorporation of Feedback	The feedback will be incorporated into IC Methodology & "Re-Issued"	24 June, 2020	PP8 /PTP
External Peer Reviewer Identification	Each PP identifies four (4) potential individuals from organisations who will act as Project Peer Reviewers (should represent a balance of different Project Target Group). See table 1, page 15. Template will be uploaded in Alfresco.	24 June 2020	ALL
Evaluation of 1st PLL participants	All participants in the 1 st PLL complete an evaluation questionnaire	31 August 2020	ALL
1st Peer Review Interviews	Each PP conduct 1 (one) interviews or "open-question" surveys with different organisations after 1 st PLL. Evidence of interview should be uploaded; Min. 1 filled questionnaires are expected from each partner.	31 August 2020	ALL
Interim Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost	Interim Assessment Report provides summary of first peer review interview feedback (1/PP); focus on specific analysis & updates for second PLL "in practice" (D.T1.2.3), plus insight into early strategic vision for CAMI4.0 Excellence.	25 September 2020	PP8/ PTP
Evaluation of 2nd PLL participants	All participants in the 2 nd PLL complete an evaluation questionnaire	25 January 2021	ALL
2nd Peer Review Interviews	Each PP conducts 2 (two) interviews or "open-question" surveys with different organisations after 2 nd PLL. Evidence of interview should be uploaded; Min. 2 filled questionnaires are expected from each partner.	25 January 2021	ALL
Final Impact Assessment Report on Policy Learning Lab and Strategy Upgrade & Boost	Final Report provides summary of PPs final 2 peer review interviews, plus quantitative analysis of WP impact on enhancing skills, capabilities & knowledge of people in charge of local, regional and (trans)national RTI policies in a triple-helix context.	26 February 2021	PP8/PTP

[JŠ4] megjegyzést írt: After the proposal and review, it is better that they are only identified as potential individuals (possibility of subsequent change)



5. Abbreviations

Abbreviation	Explanation
AF	Application Form
ASP	Associated Partner (i.e. Strategic Partner)
CAMI4.0	Central European Advance Manufacturing and Industry 4.0
PI	Policy Instrument
PLL	Policy Learning Lab
PP	Project Partner
RIS3	Regional Innovation Strategy for Smart Specialisation
S3	Smart Specialisation Strategy
SBU	Strategy Boost & Upgrade
TGP	Technology Good Practice
TIN	Trend & Innovation Networks
IC	Impact controlling
RTI	Response to Intervention
WPT	Work package thematic



5.1. ANNEX 1

5.1.1. External 1st Peer Review Template for WPT1 OUTPUTS

EXTERNAL 1 ST PEER REVIEW TEMPLATE FOR WPT1 OUTPUTS	
Partner Name	Choose an item.
Institution name	Free Text
Region	Free Text
Type of organization	Choose an item.
CAMI 4.0 related topics	Choose an item.
Date	Click here to enter a date.
Duration	
Name	Free Text
Address	Free Text
E-Mail	Free Text
Position	Free Text
<p style="text-align: center;">Introduction Text for Interviewer: <i>(It is recommended that a short project overview is given by the PP to the Interviewee, which includes insight into the plans the PP is working on to deliver value and innovation capacity building in your region)</i></p>	
<p>You are selected as external peer review individual from your regional CEUP 2030 project, due to your expertise, competence, experience and relevance to our quality monitoring programme.</p> <p>Thank you very much for your time and support.</p> <p>This interview is part of the impact controlling for the project; your answers will be summarized, so that no conclusion to individuals will be possible.</p> <p>The objective of the interview is:</p> <ul style="list-style-type: none"> • to learn what impact you expect from CEUP 2030 • to receive a first opinion on how the current outputs, work can reach these goals. <p>There will be next opportunity to meet and exchange again information, presumably in Spring 2021</p>	
<p>Overall Objective of CEUP 2030</p> <p>The main objective is to set up stable innovation network with better understanding & improved knowledge, exchange of new technologies, relevant for Central Europe Advanced Manufacturing & Industry 4.0 (CAMI4.0), fostering the exploitation of available outputs/results that will lead to an upgraded policy-making & implementation.</p>	



Specific Objective of CEUP2030:

- S01_Enhance skills, capabilities and knowledge of people in charge of local, regional and (trans)national Research, Technology and Innovation policies within the triple-helix context
- S02_Ensure awareness and shared sustainable responsibility on using the Research, Technology and Innovation knowledge resources in CE/EU for enhancing policy decision support
- S03_Anticipate and fast-track policy strategies focused on the CE/EU sustainable and continuous development, necessary to promote an aligned joint S3/RIS3 for CAMI4.0 excellence

“Research Question in 1st peer review”: focus on specific analysis & updates for second PLL “in practice” (D.T1.2.3), plus insight into early strategic vision for CAMI4.0 Excellence.

WPT1 Objective:

The overall objective of WPT1 links to the project’s specific objective of enhancing skills, capabilities and knowledge of people in charge of local, regional and (trans)national Research, Technology and Innovation policies within the triple-helix context.

The challenge manifests in two sub-objectives which are:

- (3) To train and empower people to work in the environment of new technologies (strategically and operatively) regarding policy-relevant decisions
- (4) To pool a critical mass of trained stakeholders to generate sufficient power for policy-making and appropriate selection, adaption and fine-tuning of already proven tools, instruments and methodologies.

WPT1 has two main outputs:

OUTPUT1 - CEUP 2030 Policy Learning Lab

This output describes the physical structure which will be created and deployed by each partner to train and empower policy-relevant stakeholders on the CAMI4.0 Topics, to generate sufficient knowledge exchange to support policy-making. This output has a number of parts which must be achieved for it to be considered “complete”. It consists of three major parts.

OUTPUT 2: CEUP 2030 Strategy Upgrade & Boost

This output describes the development of a Strategy & Action Plan which sets the vision and working plan for the Trend and Innovation Networks (“TIN”) for CAMI4.0.

Category & Question	Answer
A. General	
– When hearing the objectives of CEUP 2030, generally, what opportunities do you expect this project to bring to your Organization? Your region? Central Europe?	Free Text Response
– If you know Interreg Central Europe (https://www.interreg-central.eu/): How relevant do you guess CEUP2030 for Interreg Central Europe is?	Free Text Response



<p>B. Relevance & Effectiveness <i>(referring to the relevance of the project work to the objective and aim of the project, and effectiveness at building a sustainable transnational support structure with sustainable linkages & enhancing regional innovation capacity)</i></p>	
<ul style="list-style-type: none"> – How relevant and effective is the Policy Learning Lab (OT1.1.) in reaching the project's wider aims & objectives? What would you change? 	Free Text Response
<ul style="list-style-type: none"> – Could the content in PLL be quickly felt and understood? What would you change? 	Free Text Response
<p>C. Value- Creation <i>(referring specifically to the project's future activities using WPT1 outputs, to showcase how value can be created with transnational support structures - for instance: access to knowledge, personal networking, concrete cooperation)</i></p>	
<ul style="list-style-type: none"> – How can the Policy Learning Lab (OT1.1.) create value for your region's key stakeholders? 	Free Text Response
<ul style="list-style-type: none"> – How can the results of CEUP 2030 be utilized to create added value for your region's key stakeholders? 	Free Text Response
<ul style="list-style-type: none"> – How can Strategy with action plan (OT.1.2) create added value for your region's key stakeholders? 	Free Text Response
<p>D. Sustainability/Transferability <i>(referring specifically to the ability of the work package outputs to be utilized for other RIS3 aims & integrated into other initiatives to sustain and transfer results)</i></p>	
<ul style="list-style-type: none"> – What are the strengths, weaknesses, and where do you see the opportunities and potential challenges in Industry 4.0 in your region and country? 	Free Text Response



<ul style="list-style-type: none"> – How can the PLL results be used to support creation/upgrade of RIS3? Or Other Initiative(s)? 	<p>Free Text Response</p>
<ul style="list-style-type: none"> – Where do you want to see your region, country, related to CAMI 4.0? 	<p>Free Text Response</p>
<p>E. Closing Remarks</p>	
<ul style="list-style-type: none"> – What other comments or recommendations do you have about CEUP 2030 and its goals & visions, which have not been mentioned/asked yet? 	<p>Free Text Response</p>



5.2. ANNEX 2

5.2.1. External 2nd Peer Review Template for WPT1 Outputs

EXTERNAL 2 ND PEER REVIEW TEMPLATE FOR WPT1 OUTPUTS	
Partner Name	Choose an item.
Institution name	Free Text
Region	Free Text
Type of organization	Choose an item.
CAMI 4.0 related topics	Choose an item.
Date	Click here to enter a date.
Duration	
Name	Free Text
Address	Free Text
E-Mail	Free Text
Position	Free Text
<p style="text-align: center;">Introduction Text for Interviewer: <i>(It is recommended that a short project overview is given by the PP to the Interviewee, which includes insight into the plans the PP is working on to deliver value and innovation capacity building in your region)</i></p>	
<p>You are selected as external peer review individual from your regional CEUP 2030 project, due to your expertise, competence, experience and relevance to our quality monitoring programme.</p> <p>Thank you very much for your time and support.</p> <p>This interview is part of the impact controlling for the project; your answers will be summarized, so that no conclusion to individuals will be possible.</p> <p>The objective of the interview is:</p> <ul style="list-style-type: none"> to learn what impact you expect from CEUP 2030 to receive a first opinion on how the current outputs, work can reach these goals. <p>There will be next opportunity to meet and exchange again information, presumably in Spring 2021</p>	
<p>Overall Objective of CEUP 2030</p> <p>The main objective is to set up stable innovation network with better understanding & improved knowledge, exchange of new technologies, relevant for Central Europe Advanced Manufacturing & Industry 4.0 (CAMI4.0), fostering the exploitation of available outputs/results that will lead to an upgraded policy-making & implementation.</p>	



Specific Objective of CEUP2030:

- S01_Enhance skills, capabilities and knowledge of people in charge of local, regional and (trans)national Research, Technology and Innovation policies within the triple-helix context
- S02_Ensure awareness and shared sustainable responsibility on using the Research, Technology and Innovation knowledge resources in CE/EU for enhancing policy decision support
- S03_Anticipate and fast-track policy strategies focused on the CE/EU sustainable and continuous development, necessary to promote an aligned joint S3/RIS3 for CAMI4.0 excellence

“Research Question in 2nd peer review”:

focus on both outputs and on impact on enhancing skills, capabilities & knowledge of people in charge of local, regional and (trans)national RTI policies in a triple-helix context.

PT1 Objective:

The overall objective of WPT1 links to the project’s specific objective of enhancing skills, capabilities and knowledge of people in charge of local, regional and (trans)national Research, Technology and Innovation policies within the triple-helix context.

The challenge manifests in two sub-objectives which are:

- (1) To train and empower people to work in the environment of new technologies (strategically and operatively) regarding policy-relevant decisions
- (2) To pool a critical mass of trained stakeholders to generate sufficient power for policy-making and appropriate selection, adaption and fine-tuning of already proven tools, instruments and methodologies.

Category & Question	Answer
F. General	
– When hearing the objectives of CEUP 2030, generally, what opportunities do you expect this project to bring to your Organization? Your region? Central Europe?	Free Text Response
G. Relevance & Effectiveness <i>(referring to the relevance of the project work to the objective and aim of the project, and effectiveness at building a sustainable transnational support structure with sustainable linkages & enhancing regional innovation capacity)</i>	
– How relevant and effective was/is the Policy Learning Lab (OT1.1.) in order to reach the project’s wider aims & objectives? What would you change?	Free Text Response
– Was the content understandable? What would you change and why?	Free Text Response



<ul style="list-style-type: none"> – How relevant and effective was/is the Strategy with action plan (OT1.2) to reach the project’s wider aim & objectives? 	<p>Free Text Response</p>
<p>H. Value- Creation <i>(referring specifically to the project’s future activities using WPT1 outputs, to showcase how value can be created with transnational support structures - for instance: access to knowledge, personal networking, concrete cooperation)</i></p>	
<ul style="list-style-type: none"> – How did the Policy Learning Lab (OT1.1.) create added value for your region’s key stakeholders? 	<p>Free Text Response</p>
<ul style="list-style-type: none"> – How have been results of CEUP 2030 utilized to create added value for our region’s key stakeholders? 	<p>Free Text Response</p>
<ul style="list-style-type: none"> – How is Strategy (OT.1.2) creating added value for your region’s key stakeholders? 	<p>Free Text Response</p>
<p>I. Sustainability/Transferability <i>(referring specifically to the ability of the work package outputs to be utilized for other RIS3 aims & integrated into other initiatives to sustain and transfer results)</i></p>	
<ul style="list-style-type: none"> – Whether the lessons learned from the PLL (Ot1.1) were linked to the corresponding new joint improved strategy, supported by a policy implementation action plan. What are your recommendations? 	<p>Free Text Response</p>
<ul style="list-style-type: none"> – How can the PLL (Ot1.1) results be used to support other RIS3? Or Other Initiative(s)? 	<p>Free Text Response</p>



<ul style="list-style-type: none">- How can the Strategy and action plan (Ot1.2) results be used to support other RIS3? Or Other Initiative(s)?	Free Text Response
J. Closing Remarks	
<ul style="list-style-type: none">- What other comments or recommendations do you have about CEUP 2030 and its goals & visions, which have not been mentioned yet?	Free Text Response



5.3. ANNEX 3

5.3.1. EVALUATION TEMPLATE FOR 1ST PLL

1 ST POLICY LEARNIG LAB EVALUATION FORM				
Partner Name	Choose an item.			
Institution name	Free Text			
Region	Free Text			
Type of organization	Choose an item.			
CAMI 4.0 related topics	Choose an item.			
Date	Click here to enter a date.			
Duration				
Name	Free Text			
Address	Free Text			
E-Mail	Free Text			
Position	Free Text			
Content (Insert an X in the box that shows your opinion)				
	Excellent	Satisfactory	Unsatisfactory	Not Applicable
General information (time, location, etc.)				
Instructor information (contact info)				
Goals and objectives clearly stated				
Assignments clearly described				
Clarity of instructions/questions				
Content matches workshops objectives				
Appropriate level of challenge				
Did the workshop meet your expectation				
Would you have recommended to others				
Activities (Insert an X in the box that shows your opinion)				
	Excellent	Satisfactory	Unsatisfactory	Not Applicable
Clear instructions provided				
Helped develop understanding of new principles or concepts				
Helped develop new skills				
Appropriate level of challenge				

ADDITIONAL COMMENTS AND SUGGESTIONS:



5.4. ANNEX 4

5.4.1. EVALUATION TEMPLATE FOR 2ND PLL

2 ND POLICY LEARNIG LAB EVALUATION FORM				
Partner Name	Choose an item.			
Institution name	Free Text			
Region	Free Text			
Type of organization	Choose an item.			
CAMI 4.0 related topics	Choose an item.			
Date	Click here to enter a date.			
Duration				
Name	Free Text			
Address	Free Text			
E-Mail	Free Text			
Position	Free Text			
Content (Insert an X in the box that shows your opinion)				
	Excellent	Satisfactory	Unsatisfactory	Not Applicable
General information (time, location, etc.)				
Instructor information (contact info)				
Goals and objectives clearly stated				
Assignments clearly described				
Clarity of instructions/questions				
Content matches workshops objectives				
Appropriate level of challenge				
Did the workshop meet your expectation				
Would you have recommended to others				
Activities (Insert an X in the box that shows your opinion)				
	Excellent	Satisfactory	Unsatisfactory	Not Applicable
Clear instructions provided				
Helped develop understanding of new principles or concepts				
Helped develop new skills				
Appropriate level of challenge				
It has policy implications and influence on the community				
Establishes cooperation and partnerships				

ADDITIONAL COMMENTS AND SUGGESTIONS:
