**POTENTIAL OPERATIONAL ACTIONS TO IMPLEMENT A CAPITALISATION PLAN**

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| Key issues | **Potential actions to be developed (non-exhaustive list)** | **Required resources** | **Reference to current practices and tools** |
| 1. **Help givers in producing outputs/deliverables’ good ‘for capitalisation.**   Concrete outputs or deliverables are referred as solutions such as tools (e.g., Web portal, packages of products, business models, scoreboard tool, etc.), methodological approaches and strategies, guidance paper, etc. developed by the projects. | * Establish specific criteria for selection of outputs on the basis of the principle of reuse and transfer. * Carry out an in-depth analysis of outputs with the help of thematic experts. | * Internal expertise to review and adapt current criteria used for selection of outputs * Internal expertise for negotiating outputs with projects * External expertise should be activated to carry out thematic analysis | * A proposal of criteria to select outputs has been presented to the Programme during the first workshop on capitalisation. An updated model of checklist will be provided by Interact Toolkit 2.0 |
| 1. **Enable ‘givers’ to capitalise their outputs.**   This activity is to be considered as a step further toward the ‘appropriation’ of the capitalisation process from projects actors | * + Integrate any future application forms with a capitalisation section for dedicated activities (to be evaluated in case calls dedicated to small projects)   + Plan the delivery of ready to use documents in terms of capitalisation (factsheet with valuable information on key outputs (specific context elements to consider, conditions for the reuse, expected added value, need in terms of technical and/or financial support, etc.) * Demand to projects (especially to strategic ones) to set up their own capitalisation plan closely aligned with the Programme one. * Provide a specific budget for capitalisation activitiesin the financing of the projects (to be evaluated in case of calls dedicated to small projects) * Organise workshops on capitalisation for LP | * External expertise can be activated to organise workshop on capitalisation and to evaluate projects’ capitalisation plan | * INTERACT HIT (Harmonised implementation tools) has produced an application form - Final version 1.1 - November 2021 including a capitalisation section. (Provided in Interact Toolkit 2.0) |
| 1. **Create a new or integrate an existing catalogue/library of outputs.**   Digital libraries can be an important collector of all project’s outputs and/or deliverables and should be designed as a repository of the Programme. | * + Embed the digital library/catalogue into the Programmewebsite and publish the catalogue in order to ensure wider visibility to the collected outputs   + Classify the contents of the digital library according to the type of outputs and/or deliverables (strategy; action plan; collection of best practice; study; guidelines etc. | * Internal/external expertise for the creation/management of the library | * A factsheet on different types of libraries will be provided in interact Toolkit 2.0 * The Italian Agency for Territorial Cohesion (ACT) has produced an exhaustive report on existing catalogues/libraries at national level delivered to all Interreg Italian programmes * An exhaustive list of criteria to classify outputs/deliverables for libraries and/or catalogues has been recently produced by (ACT) and delivered to all Interreg Italian programmes |
| 1. **Identify potential ‘takers’, match givers and takers** | * + For identification of “potential takers”: * Identify network leaders, who could play a role of “relay” in the identification of potential “takers” * Map policies and stakeholders/competences * Have a targeted communication strategy * For mobilisation/commitment of “potential takers”: * Enhancing the link between ETC projects results and European challenging topics: green deal, digital transition… (anticipation for the next programming period and EU funding * Provide methodological and financial support (such as Transfer/Capitalisation calls and/or projects) * Organise events and/or webinars/policy learning seminars/peer-reviews sessions/study visits   + Ask and accompany projects to raise the awareness of potential receivers during the whole project duration, with an emphasis in the last phase, in all partners territories or even beyond | * External expertise can be activated for the mapping and identification of needs of potential takers and for animating thematic communities * Projects partnership can be mobilized to find their own ‘takers’ with appropriate time and support * MC members can be mobilized for identification of potential takers from their institutional relationships and networks | * Factsheet on the identification and mobilisation of potential takers (provided in Toolkit 2.0)   **(Att.3-provisional document)** |
| 1. **Issue capitalisation calls**   According to the different phases of the capitalistion plan, define which type of capitalisation calls are most conducive to the expected results of your capitalisation strategy | * + Define a tentative timetable detailing the type of capitalisation calls you propose to issue during the different phases of the Programme life cycle   + Prepare capitalisation calls documents(incl. specific capitalisation criteria for the evaluation of the submitted project proposals) | * Internal experts * External experts can be activated to draw the call documents and to evaluate the projects with the guidance of the JS/MA | * Excel document developed by Interact experts about experiences of capitalisation calls implemented by other programmes (provided in Toolkit 2.0) * Example of planning of capitalisation calls (IT\_AL\_MO) **(Att.4)** |
| 1. **Create/integrate (thematic/national) community of practices.**   The thematic/national community of practices will help contribute to the capitalisation process by building the critical mass of the Programme in each relevant thematic sector. This activity is conducive to exchanges of practices between projects and facilitate the mobilisation of various types of actors (project partners, experts, institutions, decision makers, external partners…) in specific intervention fields. | * + Join existing thematic communities/policy learning platforms (Interact, Interreg Europe/Adriatic MRS, etc) to use their services (peer reviews, thematic expertise etc)   + Issue calls for clustering of projects or for setting up thematic communities at Programme levels   + Define modalities for the animation/management of internal clusters /thematic communities   + Organise/join thematic events (workshops/living labs etc) | * + Additional budget provisions to join/associate projects to the communities * External experts for animating/managing internal clusters/thematic communities and organising events | * + - Benchmarking on experiences from 2014-2020 **(Att.5)** * Examples:  1. terms of reference of Interreg Euro-Med 2021-2027 – thematic community projects (provided in Toolkit 2.0) 2. IT/FR maritime 2014-2020 clusters **(Att.6*)*** |
| 1. **Transfer and mainstreaming** **of outputs good to be capitalised**   This process should be able to generate concrete improvement and changes for the stakeholders involved. | * + - Draft a transfer plan, clearly identify the persons in charge of the process, organise working meetings with concerned stakeholders (givers and takers) and provide adequate resources.     - 0rganise physical meetings to present the process and start exchanges when Outputs, Givers and potential Takers are identified (see points 1,2,4)     - Launch calls for transfer projects | * Internal/external experts appointed to the task of managing the process * Budget allocated to organise physical meetings, launch calls | * + - Factsheet on the transfer and mainstreaming process (provided in Toolkit 2.0) * Examples:  1. terms of reference of Interreg Euro-Med 2021-2027 thematic community projects (provided in Toolkit 2.0) 2. Med thematic community on sustainable tourism (ppt in Interact/Library/presentations 12/7/2022) |
| 1. **Interprogramme coordination about capitalisation** | * + Organise/joint events /workshops for benchmarking and alignment of capitalisation approaches and methodologies   + Integrate libraries with project practices and outputs produced by other programmes related to thematic of common interest   + Set up/integrate joint thematic communities about themes of common interest   + Coordinate the preparation and launch of capitalisation calls | * + - Internal/external experts appointed to the task of joining the inter-programme process * Budget allocated to organise physical meetings, prepare and coordinate capitalisation calls, join thematic communities etc. | * Example:   Improving synergies across the Mediterranean programmes: new calls to come (Interact/Library/presentations 6/7/2022*)* |