METHODOLOGY
FOR
KNOWLEDGE SHARING
within the project Inter Ventures

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on behalf of

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CONTENT

1. INTRODUCTION

Most organizations know that learning from the past increases the chances of success in the future – finding ways to do so can also link staff with the resources they need to complete tasks faster, better and more cheaply.

The overall goal of the Methodology for the Knowledge Sharing is to develop and implement a method to identify and communicate excellent practices in SME internationalization in order to enhance and design SME-related policies. In particular, Project Partners in project Inter Ventures will be encouraged to use this Methodology, along with other resources and their own knowledge and experience, to develop and refine at least three of their good practices in SME internationalization.

This Methodology is the third, but still not final, step in the project Inter Ventures that would **promote the internationalization of SMEs in the EU border regions, thus contributing to their growth and increased competitiveness and enhancing the development of the EU border regions**. Identifying and communicating good practices and sharing knowledge within and beyond the Inter Ventures project on a continuative or periodic basis, is a key step in contributing to the SME internationalization in the EU border regions.

This Methodology for the Knowledge Sharing has been designed by the Association of the European Border Regions (AEBR) to support the project Inter Ventures' approach on internationalization of SMEs in the EU border areas. The main aim of developing this methodology is to provide the Project Partners with a tool on how to collect and share knowledge, good practices and experience.

On the following pages the Methodology for the Knowledge Sharing will be introduced together with tips to the Project Partners about how to benefit the most from this exercise. As a result for applying this Methodology, clear and detailed good practice cases will be drafted from which others can learn; and a plan for knowledge sharing among Project Partners on internationalisation of SMEs in a specific area will be created.

Conduction of this exercise is supervised by the AEBR through the following activities:

- Facilitation of partners to identify suitable good practices;
- Monitoring of the good practices' identification process;
- Review and quality check of the good practices templates prepared by the Project Partners;
- Assisting the hosting partners in organizing the contents of the Thematic Study Visits;
- Preparation of the Good Practices Collection that will be sent to partners in order to choose those of their interest;
- Suggestions about the good practices that can be introduced during the Thematic Study Visits;
- Review and quality check of the Good Practices before the submission for validation;
- Review and quality check of the Applicability Reports elaborated by the partners.

2. CONCEPTS

Before continuing with discussions about conducting this exercise, key definitions and terminology used throughout this Methodology is introduced.

GOOD PRACTICE
According to the INTERREG Manual, a Good Practice "*is an initiative undertaken in one of the programme's priority axes which has proved to be successful in a region and which is of potential interest to other regions*"[1]. Furthermore, a Good Practice is something that has already provided tangible and measurable results in achieving a specific objective as well as Good Practices will be the source of inspiration when preparing the action plans and improving the performance of the targeted policy instruments.

SME GOVERNANCE MODEL
SME governance model is a framework to help SMEs achieve long-term success. In case of SMEs the governance model is mainly about improving business efficiency and performance.

SME
Small and medium-sized enterprises (SMEs) are non-subsidiary, independent firms which employ fewer than a given number of employees. This number varies across countries. The most frequent upper limit designating an SME in the EU is 250 employees. Financial assets are also used to define SMEs[2]. Based on this definition, the turnover of a SME should not exceed EUR 50 million.

SMEs san be divided into micro, small and medium-sized enterprises based on the following criteria:
- **MICRO ENTERPRISE:** less than 10 employees; turnover less than EUR 2 million.
- **SMALL ENTERPRISE:** 10-49 employees; turnover less than EUR 10 million.
- **MEDIUM-SIZED ENTERPRISE:** 50-249 employees; turnover less than EUR 50 million.

SME INTERNATIONALIZATION
In this Methodology 'SME internationalization' refers to all activities that put SMEs into a meaningful business relationship with a foreign partner: exports, imports, foreign direct investment (relocation or outsourcing), international subcontracting and international technical cooperation.

STAKEHOLDER:
A Stakeholder in the project Inter Ventures is any person, organisation or group that is affected by or who can affect the outcomes of this project. This means that the Stakeholder does not have to be a member of the RSG.

SME SUPPORT SCHEME
The national government or the EU may encourage SMEs via various support schemes such as, for example, tax benefits, innovation loans and grants.

[1] Source:
https://www.interregeurope.eu/fileadmin/user_upload/documents/Call_related_documents/Interreg_Europe__Programme_manual.pdf (pp.: 37)

[2] EU implemented a definition of SME concerning also its financial assets from 1st January 2005. This applies to all Community acts and funding programs as well as in the field of State Aid where SMEs can be granted higher intensity of national and regional aid than larger companies.

3. GOOD PRACTICES

In order to enhance the SME internationalization in the EU border areas, Project Partners need to be able to recognize good practices of doing so. The aim of this chapter is to provide guidance in identifying the good practices on the regional level which is relevant in terms of the Inter Ventures Project. These identified good practices will be shared among the Project Partners to provide a source for inspiration for elaborating the Action Plans, i.e. good practices are acting as the basis of the interregional learning process.

HOW MANY GOOD PRACTICES? According to the Application Form, the project should achieve **15 validated good practices** which means that at least **3 good practices per region should be identified and submitted to the Joint Secretariat.**

3.1. What is a Good Practice?

There are many good practices in every region. However, identifying them as good practices can sometimes be difficult. The rule of thumb is that a good practice is something that has already provided **tangible and measurable results** in achieving a specific objective. However, according to the Programme, only those good practices can be accepted which have public connection. Those practices which are explicitly private, i.e. practices without any public connection, will not be eligible as a good practice.

Also, there are two Main Focuses in project Inter Ventures with which the chosen good practice has to comply:

- SME's capacities for internationalization, and/or
- Governance models and support schemes for the SME internationalization.

So, in other words, **every practice that has shown good results concerning SME internationalization in a particular region and has a public connection can be considered as a good practice and though is suitable for this exercise**.

Small Business Act for Europe (SBA)3 provides the following criteria to define the good practices in the field of entrepreneurship and SMEs:

- be a policy, project, instrument or other measure introduced by - or at the initiative of - public authorities or public-private partnerships at national, regional or local level;
- be particularly targeted at SMEs and/or must specifically take SMEs needs into account;
- have delivered tangible results and be transferable;
- clearly out-perform other practices in terms of efficiency and effectiveness OR substantially improve the situation for SMEs within a Member State;
- include a communication strategy adapted to its target audience;
- be original and innovative;
- foresee an on-going evaluation of its results, preferably on the basis of predefined clear and measurable targets.

[3] The small business act (SBA) is an overarching framework for the EU policy on small and medium-sized enterprises (SMEs). It aims to improve the approach to entrepreneurship in Europe, simplify the regulatory and policy environment for SMEs, and remove the remaining barriers to their development.

The criteria listed above is in accordance with the Programme criteria except the requirement for communication strategy, i.e. the Programme does not require that the good practice has a communication strategy.

In search for the good practices, the Project Partners should look at the existing practices that might already exert some key features of the definition of good practices. Although these practices may not meet all process requirements and outcomes as formulated in definition above, much can be learned from steps that have been already been made in order to move towards these practices. As these practices are embedded in real world context, they come across real world obstacles. Understanding these obstacles and finding solutions will add value to the good practice in order to develop SME internationalization in EU border areas.

Please note that in some cases a good practice may be the process itself, as opposed to its results. For instance, an inclusive process stimulating collaboration between stakeholders may be a good practice even if the actual results (transformation of the space, investment etc) to what the process led made some of the stakeholders unsatisfied.

3.2. Identifying a Good Practice

3.2.1. Team

It is essential to undertake this exercise with a specialised team which includes the representatives of the Project Partner and relevant Stakeholders. However, please note that there is no special meeting planned for this process in Application Form.

3.2.2. Criteria of a Good Practice

To help Project Partners to identify the good practices, a set of criteria is presented in Table 1.

Table 1. Good Practice Criteria

Criterion	Description
VALIDITY	The practice must work, its objective has to be specific and it has to achieve results that are measurable
TRANSFERABILITY	The proposed practice, as carried out, must be replicable in other region or a country
SUSTAINABILITY	The proposed practice, as carried out, must be implementable over a long period with the use of existing resources
EFFICIENCY	The proposed practice must produce results with a reasonable level of resources and time
RELEVANCE	The proposed practice must address priority issues in the region
ETHICAL SOUNDNESS	The practice must respect the current rules of ethics for dealing with human populations
INVOLVEMENT OF PARTNERSHIPS	The proposed practice must involve satisfactory collaboration between several stakeholders
COMMUNITY INVOLVEMENT	The proposed practice must involve the participation of the affected communities
POLITICAL COMMITMENT	The proposed practice must have support from the relevant national or local authorities

The criteria listed above is describing a good practice in ideal conditions. However, as project Inter Ventures operates in real life, it is not possible to find a practice that will fulfil all the above mentioned criteria. INTERREG Programme requires at least three criteria – validity, transferability and sustainability - to be met by the chosen good practice, meaning that the practice should:

- show that its objective is specific, and its achievements measurable (VALIDITY);
- show a clear potential for replicability in other contexts (TRANSFERABILITY);
- provide clear indication on its cost-efficiency (SUSTAINABILITY).

3.2.3. Methods for identifying Good Practice

There are four methods on how to identify good practices – observation, communities of practice, after action review, and exit interviews. These methods are described step-by-step below.

METHOD 1: OBSERVATION

Observation is a well-known qualitative methodology to collect significate data in natural and social sciences. This method can be conducted with the following steps.

STEP 1: identify local organization(s) that deliver excellent results in the field of SME internationalization. Upon identification of these subjects, essential is to discern what parts of their overall approach or methodology represent a good practice;

STEP 2: observe what and how the organization does to get these results. The observing can be done via four ways:

- **Complete observer** (the observer is neither seen nor noticed by participants);
- **Observer as a Participant** (the observer is known and recognized by the participants and the participants know the research goals of the observer);
- **Participant as Observer** (the observer is fully engaged with the participants. He/She is a colleague or a subject who share daily habits with the participants. However, participants are aware that he/she is conducting an observation);
- **Complete participant** (the observer is fully engaged with the participants but they don't know that he/she is conducting a research).

STEP 3: To get the most out of the observation methodology, Project Partners should consider requesting the help of specialised technical personnel with previous knowledge on the thematic subject. This is likely to be done best by people with knowledge of the relevant practice. It might be useful to contact the thematic experts of the Interreg Europe's Policy Learning Platform and request for direct consultancy.

STEP 4: Project Partners can proceed with organising visits to the local SMEs to gather essential information about the good practice. Methods to keep track of the relevant data are:

- field notes (these can be written or collected via audio or video tapes), and
- journal records and unstructured interviews (informal and conversational questions to be posed to relevant subjects).

STEP 5: As soon as all the data are collected, they can be included into the **Good Practice Template** in a systematized way to draw conclusions (more information about the Good Practice Template in section 3.3.1).

In consideration of the features of the project Inter Ventures, the **observation method is an ideal type of method** because Project Partners have a very good overview of what is going on within the region and also the Project Partners have good connections with the Stakeholders who also may be the ones to observe.

METHOD 2: COMMUNITIES OF PRACTICE

Communities of Practice is another valid method to identify good practices. They involve members which have an informal bond among themselves on the basis of the common activities that they do or implement. Aim of these communities is to share lessons learned by the mutual engagement of the members while carrying out their practices.

"Communities" are defined by three elements:

- What are they about – what is the object/objective of the discussion?
- How do they work – the focus is on the informal mutual engagement of its members.
- What capabilities they can produce – namely, the different types of knowledge that has been shared their internalisation by the members.

These communities are essential to the creation and diffusion of knowledge in specific fields. As members are tied simply by their common understanding they are inclined to share only what is relevant to the other subjects in the group and to present the information in ways which are clear, understandable and oriented to the objective that is commonly perceived as strategic or of primary importance. In this sense, they operate as useful tools to identify best practices of which the members possess already some knowledge.

Essential characteristics of an effective Community of Practice are:

- **Voluntary membership**: The PPs should try to involve relevant actors and stakeholders on the basis of the common interests, i.e. the strengthening of SMEs in a particular border region;
- **The recruitment of "experts" or actors** who are credible sources of information (i.e. representatives of the local SMEs or of Chambers of Commerce). These subjects are the main responsible of the knowledge production and sharing within the group;
- The focus of the community of practices should be **to gather information and not to take decisions**. The aim is to **identify which practices produce positive results on the SMEs internationalisation in the region** where the group take place;
- The Community of Practice environment should **not recreate top-to bottom power relations**: it would be necessary to **have a coordinating leader** (e.i, the PP) but **all the participants should feel involved** in the same way and at the same level.

Basically, the Community of Practices method involves composing informal meeting groups that can be organised by the Project Partners at their premises on regular basis to involve representatives of the local SMEs, other economic actors, professionals involved in market analysis, other stakeholders that possess relevant knowledge on the field of SME internationalization to identify good practices.

METHOD 3: AFTER ACTION REVIEW

The third method is **After-Action Review** (AAR). Previous methods have been tackling finding and describing the good practices that are still in the process. An AAR is a qualitative evaluation of actions already undertaken. An After-Action Review allows to evaluate which kind of measures can be introduced to obtain positive outcome in the short term but also how to plan a stable and more effective strategy in the long period.

There are several steps to carry out an After-Action Review:

STEP 1: compose a relevant group of actors to think about a project, activity, event or, as in this case, a specific practice adopted by a SMEs or a group of SMEs;

STEP 2: create a structured review of the activities implemented until the particular moment;

STEP 3: create an analysis based on the outcomes of the good practice in question and the review of the activities taken during the implementation process and pose the following questions:

- What was supposed to happen?
- What actually happened?
- Why were there differences?

The facilitator/group leader, should encourage the discussion around these questions and, in particular, divergences from the plan should be explored.

- What worked? What didn't? Why?
- What would you do differently next time?

In addition to identifying and describing good practices, AAR is good to trigger a process of "learning by doing" in which the actors involved have the possibility to explore in detail the strengths and weaknesses of the actions implemented through the discussion and open debate with peers.

METHOD 4: EXIT INTERVIEWS

The fourth method consists in exit interviews. This is best to implement within an organization (or a union) as it is like a self-evaluation questionnaire (i.e. outlining challenges/positive outcomes – What went wrong? What went well?). This method is mainly used to find good practices within an organization or a group of organizations.

Exit interviews include two main typologies:

- **One to one discussion** – which gives the interviewer the opportunity to ask useful follow-up questions;
- **Survey** – which allows to gather relevant written answer but in a more formal and structured way and in a longer period of time.

To make exit interviews more efficient, they should try to schedule a meeting with actors in charge for the action and provide them with clear information on the purpose of the encounter. A facilitator should be appointed and an informal and friendly environment should be created as the interviewed should feel confident enough to share his/her knowledge and perspectives. The questions pose by the interviewer should be simple and clear and the facilitator, as well as the other subjects involved, should show enthusiasm and support. Finally, gather all the information properly for a subsequent review which will serve to draw conclusions.

3.3. Documenting a Good Practice

3.3.1 Templates for good practices

Best practices may come from a variety of sources. To keep and share the knowledge, good practices need to be documented. Please find the template for describing a good practice within the project Inter Ventures from Annex 1.

Besides identifying good practices based on the template brought out in Annex 1, the INTERREG programme requires to submit the chosen good practices for validation via INTERREG website. Please find more information provided by the Programme here: https://www.interregeurope.eu/projects/implement-a-project/?menu-option-selection_2=736

Please note that the template for Interreg programme website is shorter than the Good Practice Template required for the project Inter Ventures (in Annex 1). This is because most information about the described good practices may be lost while fulfilling the template given by Interreg program. So, as the aim of the project Inter Ventures is to provide for SME internationalization in the EU border areas as much as possible, this project requires a longer and more thorough template for good practices.

3.3.2. Process of documenting a good practice

The process of documenting a good practices has several steps:

STEP 1: Identify the good practice. Project Partners will identify the good practices in their regions on the topic of SME internationalization (more specifically: SMEs competences as well as government models and support schemes) (discussed in section 3.2 above). For finding the good practices, inspiration can be found from the following web-page: https://www.interregeurope.eu/policylearning/good-practices/.

STEP 2: Get an approval from AEBR to work with those good practices. Each Project Partner has to send a short description of at least three good practices to AEBR by **15th March 2020**. After careful deliberation, AEBR together with the Lead Partner then either approves or disapproves the good practices with what the Project Partner will work with.

STEP 3: Fill in the Good Practice Template (can be found in Annex 1 of this methodology). Describing the good practice by filling in the Good Practice Template will be supported by AEBR as an advisory partner of this project. This means that the Project Partners are welcome to ask questions and support from AEBR during this process.

STEP 4: Submit the final version of fulfilled Good Practice Template to AEBR for review and validation.

STEP 5: Upload the validated version of fulfilled Good Practice Template to OneDrive for the Project Partners to review. Project Partners who are going through the same process may have some good suggestions or remarks to add to your Good Practice Template.

STEP 6: Validation of good practices by AEBR (discussed in section 3.4)

STEP 7: Submitting the good practice via the Interreg website (see following section)

STEP 8: Validation of good practices by the Joint Secretariat (discussed in section 3.4)

3.3.3. Submitting the good practice to Interreg

This section provides instructions for submitting the descriptions of good practices to the Interreg system.

STEP 1: Access the Interreg system. The access for submitting the good practices can be found from the following link: https://www.interregeurope.eu/account/dashboard/

STEP 2: Fill in the good practice form. As was discussed before, the Project Partners have to fulfil altogether two templates for good practices within this project: Good Practice Template presented in Annex 1 of this methodology and a Good Practice Template required by the Interreg system. However, to spare the Project Partners from additional work and to ensure the approval of the good practice by the Joint Secretariat, the Good Practice Template in Annex 1 is built up this way that the Project Partners can just copy and paste the respective fields from this template to the Interreg system.

There are few **key points** to remember:

- Connect the good practice to the project acronym. The project acronym in our case is Inter Ventures
- Good practices proven successful are the ones with potential to inspire other regions;
- Provide meaningful information: QUALITY OVER QUANTITY;
- Submit the good practice any time before **1st of November 2021**.

3.4. Validation of Good Practices

Knowledge sharing, i.e. sharing the knowledge and experiences about the good practices is one of the objectives for not only of the project Inter Ventures, but also for the Interreg programme as a whole. However, to secure the best outcomes in knowledge sharing about the best practices, **these good practices have to be validated**. This means that the good practices have to be checked for the quality of the information provided. Within this project, there are two bodies which will validate the good practice: firstly, AEBR as an advisory partner to the project of Inter Ventures; and secondly the Joint Secretariat through the web-based system of Interreg.

The validation process within the project Inter Ventures is as follows:

STEP 1: Project Partners present the fulfilled Good Practice Template (provided in Annex 1 of this methodology) to AEBR for validation;
STEP 2: AEBR validates the presented good practices;

> **PLEASE NOTE:** Before STEP 2 will be concluded, the Good Practice Template has to go back and forth between the Project Partner several times to ensure that the document is in line with the requirements presented by the Joint Secretariat. Every time the Project Partners will revise their templates based on the comments of the AEBR.

STEP 3: Project Partners create a login for the INTERREG website to upload their good practices;
STEP 4: Project Partners copy and paste the respective parts of the Good Practice Template into the INTERREG system;
STEP 5: The project web-admin (the LP) final checks as well as approves the submitted good practices → after the approval, the good practice will be visible on INTER VENTURES website
STEP 6: Joint Secretariat validates the good practices.

Both AEBR and the Joint Secretariat will check the quality as well as the relevance of the good practices. The first level check is to ensure the following points are fulfilled:

- All the sections of the template are properly completed;

- Information provided on the template is in English;
- The description of the good practice is clear and meaningful;
- The good practice described on the template is the same good practice identified during the exchange of experience process.

In addition to the first level check, the following attributes have to be met by the presented good practices (see Table 2).

Table 2. Correct attributes of best practices

CREDIBILITY	The good practice is documented, and has sound evidence / results that have been advocated by respected persons or institutions
OBSERVABILITY	Potential users can see the results in practice, e.g. pilot/experimental or demonstration sites
RELEVANCE	The good practice addresses a persistent/sharply felt problem or policy priority
RELATIVE ADVANTAGE	The good practice offers a benefit/gain over an existing practices so that potential users are convinced that the costs of implementation are warranted by the benefits
EASY TO INSTALL AND UNDERSTAND	Process of scaling up the practice is simple rather than complex and complicated
COMPATIBILITY	The practice fits well with the practices of the national programme and with the potential user's established values, norms and facilities
TESTABILITY	The practice can be tried out incrementally on a small pilot scale before large-scale adoption

There can be three outcomes in validation of good practices:

OUTCOME 1: 'No' If the good practice is not linked to the project, the good practice can be declined.

OUTCOME 2: 'Maybe' In case the good practice is linked to the project, but there are some inconsistencies, insufficiency or vagueness in description of the good practice, the validation authority can request further information on or improvements to the good practice.

OUTCOME 3: 'Yes' If all the above-mentioned criteria is fulfilled, the good practice may get a 'Yes'. This means that the good practice is validated and though can be published on the project website.

3.5. DO's and DON'T's to identifying and sharing good practices

Here are a few Do's and Don'ts to identifying and sharing good practices:

- Good practices are not a quick-fix solution: setting up the required processes and infrastructure can be resource intensive;
- Good practice evolves constantly;
- Do not underestimate the importance of organizational culture;
- Resist the temptation to focus on explicit knowledge: it is through people that deep knowledge is transferred;
- Do not be too prescriptive about good practices and focus instead on encouraging people to identify and share them voluntarily;
- Tie good practices to business drivers, focus on those that add value, demonstrate benefits, and give evidence;
- Recognize the individuals and groups who submit good practices;

- Promote the good practice resource actively;
- Monitor usage of the good practice resource;
- Make contact to the provider of the good practice easy.

4. SHARING KNOWLEDGE

During conducting the Regional Situation Analysis, via SWOT analysis Project Partners defined their areas of improvement. To target these areas of improvement, various databases offer good practices. Even though, these databases of good practices are a useful for sharing the knowledge, most organizations find it necessary to complement the findings from the databases with face-to-face knowledge sharing. This is where true value is added for the knowledge sharing process.

There are several ways to organize the face-to-face knowledge sharing:
- communities of practice,
- quality circles,
- visits to individuals and groups displaying high performance,
- organized learning events,
- secondments, and
- exchanges.

Project Inter Ventures has chosen to conduct two **Study Visits** to conduct the face-to-face knowledge sharing. These Study Visits are aimed at <u>exchanging the good practices with each other</u>. This knowledge exchange will contribute to improving the targeted Policy Instrument. In other words, the good practices discussed within these two Study Visits will be adapted by the Project Partners in order to assist the partners' work on changing/influencing the policy instrument. The process of knowledge sharing via the Study Visits will be described below.

4.1. Thematic Study Visits

Following the Project Proposal, there will be organized two Thematic Study Visits during the Period 2 (February – July 2020) focusing on the following areas:
- 1st Thematic Study Visit focuses on **SMEs' capacities for internationalisation**;
- 2nd Thematic Study Visit focuses on **governance models and support schemes for SME internationalisation.**

4.1.1. Content of the Thematic Study Visit

According to the Project Proposal, the program of the Thematic Study Visits should include the following activities.

ON-THE-SPOT VISIT OF A GOOD PRACTICE
This on-the-spot visit should include the following:
  - discussion on how the particular good practice was identified and collected;
  - strengths and weaknesses in implementing the good practice;
  - evidences of the good practice's success;
  - evaluation of the good practice's potential of replicability in other areas.

PRESENTATIONS ON GOOD PRACTICES
Each Project Partner has to present at least one good practice on the topic of the particular Thematic Study Visit. The presented good practice(s) has to meet the following criteria:
- as the good practice(s) is directly connected to changing the chosen Policy Instrument OR will help other Project Partners to improve their chosen Policy Instruments, then the chosen good practice(s) should **reflect the specificities of the regions involved into the project**, taking into

account **especially the weaknesses identified in the Policy Instruments** that partners are willing to tackle;
- To have an impact on a given Policy Instrument, the partners should prove the good practice(s) that is **feasible on a long-term basis**, to produce **tangible, stable and recurring results** and, most of all, to **involve a good variety of stakeholders** and to **ensure support by local political institutions**;
- the selected good practice(s) should **fit the thematic focus of the Thematic Study Visit**.

It is strongly advised that Project Partners should also make sure to <u>provide alternative solutions to gaps presented by the Policy Instruments themselves</u>. For instance, if it is observed that the Instrument does not include the development of SMEs in its priority axis, the good practice proposed should properly show why SMEs are important in that specific border regions, providing facts, data, figures and elaborating strategies possibly in line with the general policies adopted by the EU at a upper level.

To fulfil these criteria, the following steps should be taken before the Thematic Study Visit takes place:

STEP 1: a short summary of the identified good practices will be sent to the Project Partners by the AEBR;
STEP 2: Project Partners will select from this good practice collection the ones which are the most relevant in their case. To make this selection, AEBR will create a doodle account for voting;
STEP 3: Based on the Project Partners' votes, the good practices most relevant for the particular Thematic Study Visit will be chosen.

A WORKSHOP ON KNOWLEDGE EXCHANGE
The aim of the workshop is to evaluate the effectiveness and applicability of the good practices. The workshop will be facilitated by the AEBR and Lead Partner. Further information as well as instructions will be provided by the AEBR and the Lead Partner before the Thematic Study Visits.

4.1.2. Organizing the Thematic Study Visit

Organizing and carrying through the Thematic Study Visit is a stressful and burdensome activity. Below are listed some factors that might contribute to the successful implementation of the Thematic Study Visit. In particular, it would be advisable:

TO GIVE PARTICIPANTS A CENTRAL ROLE
The visit should be organized in a way that allows an active involvement of the attendees, facilitating a bi-directional exchange of information and not focusing on a mere frontal or top-down style of knowledge exchange.

TO FACILITIATE A GOOD BALANCE BETWEEN THE INTERNAL MOTIVATION OF THE PARTICIPANTS AND THE EXTERNAL CONDITIONS
To do so, the hosting partner should make sure to present - in a captivating way - good practices that have a high potential of replicability in the regions of origin of the Project Partners or a high potential impact on the Policy Instruments indicated by the Project Partners. Participants, indeed, are more inclined to learn something that might have an immediate relevance for their own interests.

TO CREATE AN ENVIRONMENT THAT FACILITATES EXTENSIVE PERSONAL CONTACT
It is essential for the success of the Thematic Study Visit to create an environment that facilitates extensive personal contact and regular interaction and the building of trust among the participants.

TO ENSURE THAT THE PARTICIPANTS ARE ENGAGED ALREADY BEFORE THE EVENT

The Host Partner can provide to the success of the Thematic Study Visit via the following activities:

- Host Partner asks Project Partners to provide relevant information on their expectations and needs towards the Thematic Study Visit. This can be done by the Host Partner via sending the Project Partners a brief questionnaire (see Annex 5 for template). This information is also needed to structure the various activities planned for the visit.
- The host partner will share relevant background information about the site where the visit will take place, its social-historical and economic features and to highlight similarities and differences in comparison with the regions on of origins of the other partners. This is essential to trigger the learning process already before the visit takes place (see a template in Annex 4);
- A thorough agenda of the event, including some key-points on the selected good practices should be presented together with the background documentation to the Project Partners.

4.2. Follow-up activities after Thematic Study Visit

There are several follow-up activities after the Thematic Study Visits are completed. These activities are discussed below.

THEMATIC INFOGRAPHIC

After each Thematic Study Visit, each Project Partner should create Thematic Infographic (together 2 Thematic Infographics per Project Partner) with the aim of summarising the flow and logical framework of actions and data, thematic findings of regional analysis, good practice collection and action planning. The template for the Thematic Infographic will be prepared by the Project Communication Team.

FOLLOW-UP RSG MEETING

Each Project Partner should, after the 2nd Thematic Study Visit, organize a follow-up RSG meeting. The aim of the Follow-up RSG Meeting is to brief stakeholders about the following:

- lessons learnt during the Thematic Study Visits;
- which good practices can be adapted to the particular region;
- how the stakeholders can contribute to the action planning process.

During the follow-up RSG Meeting, both of the Thematic Infographics should be introduced. The outcome of the Follow-up RSG meeting is a consensus about what good practices and how to use to improve the targeted Policy Instrument. This meeting provides also for the Applicability Report.

THEMATIC PORTFOLIO

Hosting partners will elaborate a Thematic Portfolio (see template in Annex 2) including all the relevant aspects of the good practices presented in the course of the Thematic Study Visit. The aim of the Thematic Portfolio is to provide a thorough description of the good practices, a self-assessment concerning their feasibility, applicability and innovative character of presented good practices and detailed contact information. The Thematic Portfolio will be circulated among the other Project Partners and relevant stakeholders to prepare for the Follow-up RSG Meetings. This document will also serve as a basis document for the Project Partners to draw conclusions on the possibility to replicate the good practices in their particular regions and to facilitate the compiling of the Applicability Report.

APPLICABILITY REPORT

Based on the Thematic Portfolios prepared by the hosting partners as well as the conclusions of the Follow-up RSG Meetings, each region will elaborate an Applicability Report (see template in Annex 3) including potentially applicable good practices for the respective region in both thematic focus areas. The aim of the Applicability Report is to analyse the presented good practices in order to choose which good practices can be applicable to their region.

The Applicability report will target these three main questions:

- is the applicability of the good practice feasible in the particular area?
- what is needed to adapt the good practice to the new context?
- would the transferability be possible, in consideration of the target groups that will be involved and the resources (incl required infrastructure) at disposal?

The infrastructure mentioned above can considered to be as follows:
- The people to facilitate and drive the process through its initial stages, until it becomes embedded in the organization's ways of working, e.g., a good practice team or a network of good practice coordinators;
- The technical infrastructure for document sharing and databases;
- The content management infrastructure to ensure that good practices are documented and classified electronically in a way that makes them easy to find.

The Applicability Report will be reviewed by AEBR who will provide feedback and recommendations for the sustainability and effectiveness of the selected measures.

4.3. Project Partners' responsibilities through the Knowledge Sharing process

There are several tasks that Project Partners have to complete during the Knowledge Sharing process. To be sure that all the tasks have been completed, the following check-list is created.

The Project Partners of the project Inter Ventures have the following responsibilities:
- to identify the good practices and fulfil the template for each good practice (three good practices per Project Partner);
- upload the good practices approved by AEBR on INTERREG website as well as fulfilling the clarification rounds sent by the Joint Secretariat if it is needed;
- participate at two Thematic Study Visits;
- present their selected good practices to other Project Partners;
- prepare two Thematic Infographics (one per a Thematic Study Visit);
- organize the Follow-up RSG Meeting;
- elaborate an Applicability Report.

In addition to the above responsibilities, the Hosting Project Partners have the following responsibilities:
- regular contact with the AEBR regarding the programme as well as the good practices that will be introduced on-the-spot during the Thematic Study Visit;
- regular contact with the Lead Partner regarding the status of organizing the event;
- communicate with other Project Partners to collect relevant information on their expectations for the Thematic Study Visit and on more practical aspects (travel arrangements, food allergies, etc);
- prepare a small report including relevant aspects of the region where the study visit will be held (political framework supporting the internationalisation of the SMEs and relative regional entities in charge) (see Annex 4 for the template). Information therein contained can be taken from the Regional Situation Analysis;
- distribute the small report and the programme to the other Project Partners at least 15 days prior the study visit;
- organize the logistics of the Thematic Study Visit;
- prepare the Thematic Portfolio and spread it among other Project Partners.

4.4. Timeframe for Knowledge Sharing

To keep track of all these above listed responsibilities, the following timeframe is set.

ACTIVITY	DEADLINE
Knowledge Sharing Methodology sent to Project Partners	18th February 2020
Proposed good practices sent to AEBR	15th March 2020
Approval for the proposed good practices by AEBR	1st April 2020
Brief overview of the good practices sent to Project Partners	1st April 2020
End of Doodle voting about the practices presented in Study Visit	6th April 2020
1st Thematic Study Visit	15-16 April 2020
1st Thematic Portfolio by BURG	5 May 2020
1st Thematic Infographic by each region	5 May 2020
2nd Thematic Study Visit	17-18 June 2020
2nd Thematic Infographic by each region	30 June 2020
2nd Thematic Portfolio by Klaipéda	5 July 2020
Organization of the RSG Follow up meetings	31 July 2020
Applicability Report by each region	10 September 2020
Approval of the Applicability Report by AEBR	30 September 2020
Validation of good practices	1 November 2021

ANNEX 1. GOOD PRACTICE TEMPLATE

(for use within the project Inter Ventures)

*This is a **longer version of the good practice template provided by the program. This version was designed for internal use** and knowledge exchange among the Project Partners within the project Inter Ventures. The additional space provided allows for a more in-depth and nuanced account of the practice, allowing for a more meaningful and, hopefully, more successful transfer of knowledge.*

*Please provide **three Good Practices per Project Partner.** Please use a **separate copy** of this template for each of the Good Practices.*

*Please see the comments in **orange** for guidance on how to fill the template.*

1. **Your organisation**	
Name of your organization	
Country	
Region	
City	

<table>
<tr><th colspan="3">2. Organisation in charge of the good practice
[If your organization is not the one in charge of the good practice, you can indicate the relevant organization in this section of the form.]</th></tr>
<tr><td>Is your organisation the main institution in charge of this good practice?</td><td colspan="2">Yes or no</td></tr>
<tr><td rowspan="3">In case ‘no’ is selected indicate the the organisation in charge:</td><td>Country</td><td></td></tr>
<tr><td>Region</td><td></td></tr>
<tr><td>City</td><td></td></tr>
<tr><td>Main institution in charge</td><td colspan="2"></td></tr>
</table>

<table>
<tr><th colspan="3">3. Good practice general information</th></tr>
<tr><td>Title of the practice</td><td colspan="2">[100 characters]</td></tr>
<tr><td>Thematic objective of the practice</td><td colspan="2">SME’s capacities for internationalization, or
Governance models and support schemes for the SME internationalization</td></tr>
<tr><td>Geographical scope of the practice</td><td colspan="2">Select National/Regional/Local</td></tr>
<tr><td rowspan="3">Location of the practice</td><td>Country</td><td></td></tr>
<tr><td>Region</td><td></td></tr>
<tr><td>City</td><td></td></tr>
</table>

4. **Detailed description**	
Short summary of the practice	***[160 characters]***

Detailed information on the practice	*[up to 1500 characters]* *Please provide information on the practice itself.* - *What is the problem addressed and the context which triggered the introduction of the practice?* - *How does the practice reach its objectives and how it is implemented?* - *Who were the main stakeholders and beneficiaries of the practice?*
Background of the good practice	*In here, please describe the background / enabling conditions that made the practice possible, such as, for example, presence of specific knowledge or skills, regulations or supporting policies, or other place-specific features.* *How much are the enabling conditions place specific (that means reliant on the local governance, legal, cultural, or geographical features). These conditions may hinder transferability or call for substantial adaptation of the practice to the recipient context)?*
Activities carried out within the practice	- What were the main activities carried out? - When and where were the main activities carried out? - Who were the key implementers and collaborators? - What are the processes and steps involved?
Resources needed	*[up to 300 characters]* *What resources and skills are needed to carry out this practice? Please specify the amount of funding/financial resources used and/or the human resources required to set up and to run the practice.*
Timescale (start/end date)	*e.g. June 2019 – May 2020/ongoing*
Evidence of success (results achieved)	*[up to 500 characters]* *Why is the described practice considered as good? Please provide factual evidence that demonstrates its success or failure (e.g. measurable outputs/results).*
Challenges encountered	*[up to 300 characters]* *Please specify any challenges encountered/lessons learned during the implementation of the practice.*
Limitations	- *What are the (economic, environmental, technical, etc.) limitations of the practice?* - *Are there any trade-offs and/or negative externalities?* - *What worked very well – what facilitated it?* - *What did not work – why did it not work?* - *What provides difficult?* - *What would the originators of the practice do differently if they were to do it again?*
Potential for learning or transfer	*[up to 100 characters]* *Please explain why you consider this practice (or some aspects of this practice) as being potentially interesting for other regions to learn from. (Where is this practice applicable and what problems does it solve?) This can be done e.g. through information on key success factors for a transfer or on, factors that can hamper a transfer. Information on transfer(s) that already took place can also be provided.*
Suggestions	*Please provide suggestions, with hindsight, what could make this an even better practice and how actors from other regions learning from it could improve it further when transferring it into their local context.*
Further information	*Provide a list of references, source of documents, or a link to these documents, that give additional information on the described good practice for those who may be interested in knowing how the outcomes of the good practice have benefited the area (e.g. expert contact details, workbooks, video clips, articles, transcripts of review meetings, etc.)*
Keywords related to your practice	*Add keywords*
Insert image(s)	*Please provide several images where necessary to offer a deeper understanding of the practice.*

ANNEX 2: THEMATIC PORTFOLIO TEMPLATE

*Please see the comments in **orange** for guidance on how to fill the template.*

For each Thematic Study Visit a Thematic Portfolio Template will be fulfilled including all the good practices discussed during that particular Thematic Study Visit.

Good practice general information		
Title of the practice	***[maximum of 100 characters]***	
Thematic objective of the practice	*SME's capacities for internationalization, OR Governance models and support schemes for the SME internationalization*	
Geographical scope of the practice	*Select National/Regional/Local*	
Location of the practice	Country	
	Region	
	City	

PRACTICE I: ***[fill in the name of the practice]***

Brief description of the good practice / measures discussed within the Thematic Study Visit	*>What are the problems addressed? >How did the actors/agencies involved address these problems?*
Strengths and weaknesses in implementing the good practice	
Additional comments	*>for example, main discussion points about this practice held during the Study Visit*
Project Partner presented the good practice	*>Name of the person responsible for the GP >Name of the actor/agency >Email address >Phone number*

PRACTICE II: ***[fill in the name of the practice]***

Brief description of the good practice / measures discussed within the Thematic Study Visit	*>What are the problems addressed? >How did the actors/agencies involved address these problems?*
Strengths and weaknesses in implementing the good practice	
Additional comments	*>for example, main discussion points about this practice held during the Study Visit*

Contact details to obtain further information on the good practice	*>Name of the person responsible for the GP* *>Name of the actor/agency* *>Email address* *>Phone number*

Please, provide at least three pictures (or graphs) related to each good practices presented in the course of the Thematic Study Visit.

ANNEX 3. APPLICABILITY REPORT

Please fill in as many good practices as you consider as an applicable good practice in your region! Based on Thematic Portfolios prepared by the hosting partners as well as the conclusions of the Follow-up RSG Meeting, please include all potentially applicable good practices (presented with during the Thematic Study Visits) which can be relevant in your region!

APPLICABLE GOOD PRACTICE I

*Please see the comments in **orange** for guidance on how to fill the template.*

Good practice general information	
Title of the practice	***[maximum of 100 characters]***
Thematic objective of the practice	*SME's capacities for internationalization, OR* *Governance models and support schemes for the SME internationalization*
Region in which the Project Partner wants to replicate it	

Good practice targeting the Policy Instrument	
What gaps/weaknesses does this good practice target in the Policy instrument?	
How does this good practice target these gaps/weaknesses?	
What changes should be made in the good practice to target more gaps/weaknesses in the Policy Instrument?	*>is there possible to make changes in the good practice so that it would target more gaps/weaknesses in the Policy Instrument?* *>what changes these may be?* *>how resource-heavy would these changes in the good practice be?*

Feasibility of the good practice in the particular region	
Do you have proper and reliable support?	*>Describe in here the support needed for applying the particular good practice;* *>Discuss the support you have for applying the good practice from, for example, the local politicians, stakeholders etc.* *>Is the top-down (political) commitment assured?* *>Is there enough political support in the particular area for the practice to be implemented?*
Is there a stable funding option to support the good practice application in the long term?	
Are there any factors (of political or economic nature) that can clearly prevent implementation of this good practice?	
Are there any factors (of political or economic nature) that can clearly foster its implementation?	

Adaptation of the good practice in the particular region	
Can the existing design of the good practice be applied as it is?	*In case the good practice cannot be applied fully, please describe which parts of the good practice can be applied.*

	Also, please describe which parts of the good practice cannot be applied and why
To what extent does the application of the good practice targets the problems in the application area?	
Which aspects of the good practice would you have to change in order to adapt them to the needs of your region?	
How do you plan to change them?	

Transferability/applicability of the good practice in the particular region	
Target groups involved:	*>Do the target groups of the existing good practice coincide with the ones in the region where the good practice will be replicated?* *>Can the decision-making process of the good practice be replicated in the new region?* *>Who are the key actors that should be taken into account?* *>How do you plan to engage them?* *>Is the identified group of stakeholders appropriate to ensure the transferability of the good practice?* *>Which are the stakeholders that should be actively involved?*
Multi-level and multi-professional approach:	*>Can all relevant sectors included in the good practice be transferred in the applicable area?* *>Do people in charge for the applicability of the good practice have enough competences to ensure a successful implementation?* *>Is there enough professional commitment?* *>Is there enough resources and competences to properly disseminate (in a transparent way) the aim and result of the good practice in the applicable area?*
Human resources:	*>Can the transferred good practice rely on the equivalent amount of well-qualified, clearly defined and committed human resources as the existing one?* *>Does the new context require a shift of human resources to different institutions and/ or stakeholders?* *>Is there a key person with high social skills available in the practice to be transferred in order to drive the process and foster networks?*

Timeline and action plan	*Elaborate an action plan and relative timeline for the implementation of the good in the particular region*

APPLICABLE GOOD PRACTICE II

*Please see the comments in **orange** for guidance on how to fill the template.*

Good practice general information	
Title of the practice	***[maximum of 100 characters]***
Thematic objective of the practice	*SME's capacities for internationalization, OR* *Governance models and support schemes for the SME internationalization*
Region in which the Project Partner wants to replicate it	

Good practice targeting the Policy Instrument	
What gaps/weaknesses does this good practice target in the Policy instrument?	
How does this good practice target these gaps/weaknesses?	
What changes should be made in the good practice to target more gaps/weaknesses in the Policy Instrument?	*>is there possible to make changes in the good practice so that it would target more gaps/weaknesses in the Policy Instrument? >what changes these may be? >how resource-heavy would these changes in the good practice be?*

Feasibility of the good practice in the particular region	
Do you have proper and reliable support?	*>Describe in here the support needed for applying the particular good practice; >Discuss the support you have for applying the good practice from, for example, the local politicians, stakeholders etc. >Is the top-down (political) commitment assured? >Is there enough political support in the particular area for the practice to be implemented?*
Is there a stable funding option to support the good practice application in the long term?	
Are there any factors (of political or economic nature) that can clearly prevent implementation of this good practice?	
Are there any factors (of political or economic nature) that can clearly foster its implementation?	

Adaptation of the good practice in the particular region	
Can the existing design of the good practice be applied as it is?	*In case the good practice cannot be applied fully, please describe which parts of the good practice can be applied. Also, please describe which parts of the good practice cannot be applied and why*
To what extent does the application of the good practice targets the problems in the application area?	
Which aspects of the good practice would you have to change in order to adapt them to the needs of your region?	
How do you plan to change them?	

Transferability/applicability of the good practice in the particular region	
Target groups involved:	*>Do the target groups of the existing good practice coincide with the ones in the region where the good practice will be replicated? >Can the decision-making process of the good practice be replicated in the new region? >Who are the key actors that should be taken into account? >How do you plan to engage them? >Is the identified group of stakeholders appropriate to ensure the transferability of the good practice? >Which are the stakeholders that should be actively involved?*
Multi-level and multi-professional approach:	*>Can all relevant sectors included in the good practice be transferred in the applicable area? >Do people in charge for the applicability of the good practice have enough competences to ensure a successful implementation? >Is there enough professional commitment?*

	>Is there enough resources and competences to properly disseminate (in a transparent way) the aim and result of the good practice in the applicable area?
Human resources:	*>Can the transferred good practice rely on the equivalent amount of well-qualified, clearly defined and committed human resources as the existing one?* *>Does the new context require a shift of human resources to different institutions and/ or stakeholders?* *>Is there a key person with high social skills available in the practice to be transferred in order to drive the process and foster networks?*

Timeline and action plan	*Elaborate an action plan and relative timeline for the implementation of the good in the particular region*

ANNEX 4. SMALL REPORT ON HOST REGION

Please see the comments in** orange **for guidance on how to fill the template.

This report should be maximum of 2 A4 pages long

Portrait of the region	
Name of the region (and country)	
Size of the area of the region in km^2	
Population size	
Biggest cities in the region	

SMEs in the region	
Total number of SMEs in the region	
Main fields of activities of the SMEs	

SME internationalization	
Brief description of political framework supporting the internationalization of SMEs	*Very brief description about laws, strategies, funds targeted towards SME internationalization*
Identified gaps between the provided SME support schemes and the SME needs	
Perceived main barriers for the SME internationalization	

ANNEX 5: Pre-study visit survey

It is advisable for the Hosting Partner to circulate this survey among the Project Partners who will attend the study visit. It might be a useful tool to collect information on the expectation of the other Project Partners and on more practical aspects concerning the organisation of the visit on site.

General information	
Name of organization	
Contact Person Name	
Email	

Describe briefly the challenges you are targeting in SME internationalization in your region?

From your perspective, what might the other Project Partners learn from your experience?

What are your knowledge and learning goals for this Thematic Study Tour?

Further comments (if any)

Logistics	
When will you arrive?	
When will you depart?	
In which hotel will you stay?	
Do you have food allergies?	