# Cap&Com workshop

**How to link capitalisation and communication: the power of communicating good stories and results to reach relevant target groups and the lobbying.**
**5-6/July/2017**
**Budapest, Hungary**

# Summary

## Main objectives

The event focussed on how to explore and define the process of turning capitalisation results into communication stories - how to link communication and capitalisation results as part of the main content of programme communication activities;

Participants learned and exchanged their experiences related the most effective approaches to extracting and communicating capitalisation content from multitude of thematic projects to the appropriate target groups – lobbying and how it can help making Interreg more visible in the policy context.

## Content and topics

- Defining the role of the communication officers in the capitalisation processes and the role of capitalisation officers in the communication processes;
- How to integrate capitalisation within the communication strategies on both the Programme and project levels;
- Using the storytelling techniques for effective communication of capitalisation results;
- How to select and communicate the relevant capitalisation results to different stakeholder and policy-maker groups –lobbying.

# Day 1 – 5 July 2017

1. Introduction: capitalisation vs. communication

## The concept of capitalisation in Interreg

> *Capitalisation* is about gathering, organising and building upon existing programme and projects results, within specific fields. It is crucial to have a better focus on the projects' results and dissemination to interested audience /target groups.

| How do we implement capitalisation? | How do we implement communication? |
|---|---|
| 1. Gathering results => analysis (projects), coordination<br>2. Promotion of results => promotional and capitalisation events/targeted campaigns, networking events, simplicity of language<br>3. Re-use of results => validation/follow-up, effects?<br>4. Influence policies => link with public decisions, modifying legislations | 1. Information about programme funding opportunities and activities<br>2. Publicity and visibility<br>3. Involvement of programme stakeholders and partners<br>4. Promotion of results<br>5. Raising awareness, Annual Events/targeted campaigns, networking events, simplicity of language<br>6. Influence policies |

## The role of communication in Interreg – Project Slam

The "Interreg 25 years – Project Slam" is an example of how Interreg results and content could be turned into simple, attractive and innovative communication activities and styles.

The main challenges for Interreg staff is to find the good results and stories, with an impacting potential on the key decision makers and stakeholders.

In this sense, during 2015, Interact worked on a specific call and methodology to identify and present Programme's and project results during the "25 years of Interreg" Conference in Luxembourg (15-16 Sept 2015).

Key questions:
*How to identify the results and expected impacts?*
*What potential transferability of these results in other contexts?*
*How to create an attractive and funny story?*

<u>Tools developed by Interact:</u>

- Methodology made available to programmes with all related materials: Call for proposals, Preselection of 5 projects, Preparation of the performances and Session, tools developed, videos of the session, etc.
- Specific (capitalisation) activity at programme level to identify best practices and stories: the difficulty is to build the story
- Dedication to promote projects and programme achievements
- Partners' involvement, to build a story
- Programme authorities support in the definition of the story
- Joint implementation

INTERSYC (Integrated territorial Synergies for Children Health and Protection) project was the winner. It was co-finance by the Greece-Bulgaria cross-border cooperation programme. It told a story in different ways with Greek theatre; it had a strong impact within this territory. Web-link: https://www.youtube.com/watch?v=XfIrNiUconY

**Interreg 25 years event - Project Slam final repository:** http://www.interact-eu.net/#o=news/interreg-25-years-event-project-slam-final-repository
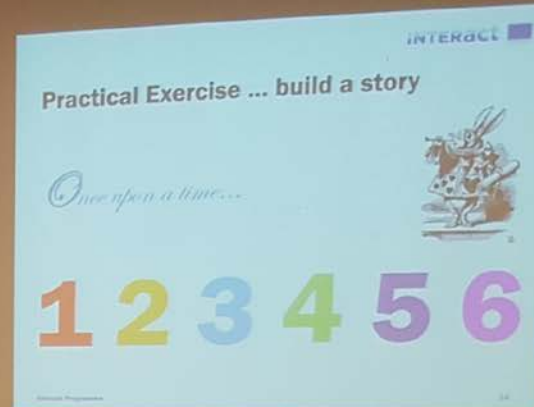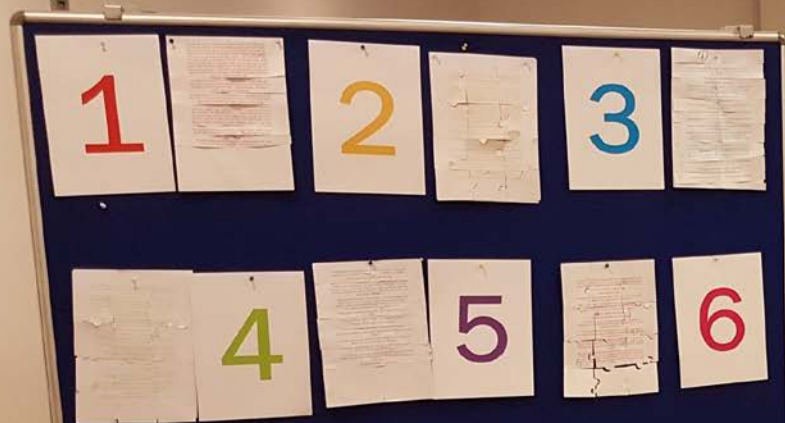
### Round table discussion

#### QUESTION 1. When and how should the programme promote the capitalisation approach to the projects / applicants?

Inputs from participants:

| WHEN? | HOW? |
|---|---|
| The concept of capitalisation should be included throughout the overall programming period:<br>- During the drafting of the CP<br>- During the preparation of the call for proposals (targeted and tailored-made ToR per specific objectives – within the programme and beyond) – to be disseminated during Info-days (workshops for potential beneficiaries should present good examples) - capitalise on the existing knowledge<br>- During the pre-application phase and after (contact the beneficiaries after the end of the projects)<br>- During project generation: do not make it more complicated for applicants; assist the projects in developing the capitalisation ideas;<br>- Before the project starts and during the life cycle of the programme monitoring<br>- After the closure of the project: important to have contacts to the projects and discuss, share the results | By different means on strategic orientation of the programme:<br>- Networking; joint thematic events, exchange of good practice<br>- Targeted calls<br>- Give projects examples of activity we expect them to do but do not make it restrictive<br>- Dedicated space area In the AF + set evaluation criteria to assess how the results of previous programmes are used<br>- Guidance at project level – trainings – Interact Capitalisation Networks – Interreg Europe Platforms – Data collection and analysis<br>- Build a network of project communication officers<br>- Policy papers and recommendations<br>- Presented to the decision-makers of the mainstream programmes<br>- Development of inter-programme communities |

- Avoid talking about "capitalisation" (another "Brussels invention" – part of bureaucratic language)
- Keep it simple and explain in familiar terms what we expect from capitalisation
- Explain the benefits of capitalisation in the AF and guidance documents and it should not be seen as an additional task
- Capitalisation does not end in communication; it is only one part.

## QUESTION 2. What is the place of capitalisation within communication process on both programme and project levels and vice-versa?

### Mapping capitalisation and communication roles

| | Preparation of calls for proposals | Evaluation of project proposals | Project reporting | Project visits | Programme monitoring | Stakeholder relations | Policy-makers relations / Lobby | Programme communication |
|---|---|---|---|---|---|---|---|---|
| *Communication manager* | 1 | | | 1 | | 4 | | 6 |
| *Capitalisation manager* | 2 | 1 | 3 | | 3 | | 1 | |
| *Combined manager* | 4 | 1 | 2 | 2 | 1 | 1 | 1 | |
| *Head/coordinator* | | | | | 1 | 1 | 5 | |

Key lessons:

- Important to share the roles within the JS in the stages of preparation
- Capitalisation is a shared responsibility
- Effective communicate needs to rests on capitalisation
- In order to do a good lobbying, you need to have a good capitalisation
- Heads of MA/JS should not be the only ones promoting the programme to policy-makers (political lobby) – it is essential that they know very well the programme content and capitalisation
- Head MA/JS should interact in bottom-up / top-down approach

## 2. Practical training: How to turn capitalisation results into engaging communication stories?

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# What is a STORY?

# A STORY is a block of words and images that has an intention designed it exists for a reason and for someone

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### Point 1. Why communication is fundamental?

Current situation: we receive 5.000 signals per day and commercial brands are winning
Emphasis on the huge differences between "tells a story" and "tell a story about a story"

| Tells a story | Tell a story about a story |
|---|---|
| - So that you can move someone in a direction<br>- So that someone feels something, thinks something, does something now<br>- So that someone absorbs information better and faster, avoid the mistakes, rehearse the situations before they present themselves | - So that other storytellers can tell better stories.<br>- So that other creators can build better creations. |

### Point 2. The simplest way to talk about a project

Recipe = Elevator pitch

### Key steps of the approach are as follows:

| | |
|---|---|
| For | (target audience – e.g. – policymakers) |
| Who have | (a problem to solve – e.g. – do not have the time to read a 40 pages report) |
| We created | (Project name) |
| Which is a | (Market category) |
| That | (Key benefit – what it does which is "particular") |
| And that unlike | (competition solution / company) |
| Offers | (something very different from the competing solution) |

### Point 3. Make people move and understand

How to tell the story better in the Interreg context?
- Understand the logic of telling the story of the story
- Selling the programme - Making him successful
- Raising awareness in general terms is the worst approach
- State of play in Interreg: 107 ETC programmes – €10 billon budget – Thousands of projects =>Simplicity does not precede complexity, but follows it.
- Good approach: move 300 people to consult the dedicated webpage on the issue
- Basic executive summary = elevator pitch
- In short: MAKE PEOPLE MOVE AND UNDERSTAND

### Point 4. Target audience = people

- Citizens are too general!
- Criteria of target audience shall be used such as: Age, Gender, Salary, Place of living, Family members, Ethnic background, Digital connection.
- More specific questions can also be included to have an in-depth view of the target audience.

### Point 5. It all starts by doing something

Example in the context of European policies.
- At ETC level, build a meta-story, explaining the role of MA/JS, and do not only promote projects in a classical way.
- Question at the programme: what are the reasons why we promote programmes/projects?

Other lessons:
- In order to tell a story, you first need to do something important => let's better target journalists rather than citizens
- A good story shows the real challenges, and how someone overcame them
- Testimonials are a good way to tell stories
- Video case studies of 2 minutes are excellent for rapid sharing if they fit the proposed content.

The sequential approach (Problem / Insight / Solution / Results (Proof) / Vision & Brand) is described below:

| Type of story | Sequence | Structure | Why |
|---|---|---|---|
| **PROBLEM / INSIGHT / SOLUTION / RESULTS** | PROBLEM | PROBLEM Global / Impact | One single short sentence to say "there is a problem" |
| | | PROBLEM Insight more precise | 3 to 4 other people stating the problem at a smaller or larger scale / or images showing this problem |
| | | PROBLEM explain it in a sentence | Wrap-up of the problem in a sentence with a higher level of vocabulary |
| | INSIGHT | INSIGHT - Something we discovered | Something made sense to us that motivated this project |
| | | INSIGHT - proof of the insight | Showing what we discovered that is unique |
| | SOLUTION | SOLUTION - Quick exposure of the solution | This is what we've done to get other the problem |
| | | SOLUTION - How we made it in details | Explaining the huge challenge ahead and how we build a solution |
| | | SOLUTION - Showing all the work | We made lots of things to bypass the problem (we did a lot / lots of images) |
| | RESULTS | RESULTS - And this brought all this change | Our solution brought a massive change |
| | | RESULTS - prove effect on people | Other people saying how much it helped |
| | | RESULTS - showing metrics | Show the numbers / data proving the change |
| | VISION | VISION - showing the underlying philosophy | Remind people why you did it in the first place |
| | | VISION - slogan | One simple 5 words max sentence to remember the project |

## Point 6. Competences you need in your team

Script / Cinematography / Direction / Animation / Editing / Art Direction / Sound Design / Visual Effects

## 3. World Café discussion

**Overview of inputs from participants:**

### What are the main tools to develop for good results and stories?

- Databases (e.g. KEEP)
- Evaluation
- Questionnaire – desk-research
- Project visits / meetings / one-to-one communication
- Project monitoring (progress reports, calls, etc.)
- Project officers (internal communication as a channel), or where existing communication officers of projects
- Training on communication for beneficiaries/ project officers
- Project websites / social media
- Promotional materials, newsletters to multipliers
- Less information and more communicative stories about achievements

### What elements would Programmes need to get from projects' implementation and monitoring, to build stories to sell?

- Elevator pitch answers / matrix
- Interview with final beneficiaries / Storytelling (e.g. personal story => "there is a farmer…;")
- Nice visual elements (e.g. high resolution photos)
- Evidence => DATA => and stories (successes and challenges) +Photos – videos – reports
- Clear definition of the problem + capture the heart of the project + showcase its added-value
- Conceive the story and success (press release) at application stage; store into eMS (summary, benefits, etc.)

### How to build the knowledge and capital from project level?

- Clustering projects per topic - Thematic events
- Dissemination through events, publications, studies on the topic
- Analyse & identify potential synergies and joint activities
- Interactive databases / library to extract infos
- Creation of a shared platform (with repository, library)

- Network of projects and other pan-European networks (PLP of Interreg Europe and Capitalisation networks of INTERACT)
- Engage a debate within the monitoring committee to agree on what the CP wants to promote regarding the knowledge built by the projects. On the basis of these decisions, train projects leaders accordingly on what is needed
- Involve policy-makers in the projects (e.g. stakeholder group in Interreg Europe projects)
- Make members of the monitoring committee as multipliers
- Cross-border peer-review to get to know each other (support from MC members on the territory)

# Day 2 – 6 July 2017

### 4. How and when to communicate the capitalisation results?

*Talk show "Post 2020 discussions updates" with Jean-Marc Vénineaux (EC – DG Regio) about the Cohesion forum and future of cohesion policy.*

### Question 1) What are the different trends on ESIF post 2020?

The discussion on the future of European policies post 2020 was based on a white paper released in March 2017 by the EC. It included 5 papers addressing: Social dimension, EMU, Defence, Globalisation, Budget. Scenario proposed by the EC:
1. Status go – business as usual
2. Doing less together (Single market) – "less favourable for European territorial cooperation"
3. Two speed Europe (some do more than others) – keep the same kind of policy
4. Radical redesigning – less favourable
5. Doing more together – ideal scenario

It is now up to MS to react and to take a decision by the end of December 2017 on which scenario they favour. In any case, it will be in a context of a lower budget. The EU budget is no longer supposed to increase.

### Question 2) For those who couldn't follow the web streaming session, could you highlight some conclusions of the past Cohesion Forum and how it would influence to the current discussions on the post 2020 budget in the cohesion and regional policy?.

<u>Key ideas and messages:</u>
- MS have to be ready to work in a context that will be less favourable
- Cohesion policy needs to be reformed. Some issues on the table:
  - More flexibility to react to terrorism for instance. Something needs to be put aside in case of external shock.
  - Faster implementation – policy is underperforming in terms of spending – Only 3% of actual expenditure of ESIF in early 2017
  - Administrative capacity building is important for many countries
  - There could be an increase in the national part-funding to bring about a higher leverage rate
  - Should the whole territories of countries be covered?
  - Single fund? Good for flexibility but many discussions among DGs
  - Single set of rules?
  - System of allocation of funds not only based on GDP/inhabitant
  - Duration of the next programming period: 7 years or 5 + 5 years?

- Cooperation needs to be clearly considered in the future. A paper recently published by Germany stressed the need to keep cooperation with the 3 strands. The French national authorities are on the same line.
- When reporting to the stakeholders in an ETC programme, the message shall be: If you do not consider the cooperation in your policy, you are missing something. Benchmark your country/region against others. In the private sector, cooperation is strong even if they are competitors, while it is very rare in the public sector.

## Question 3) Next steps to be followed.

<u>How and when communicate capitalisation results to influence?</u>
According to Jean-Marc Venineaux, convincing the EU institutions to consider Interreg results in their policies is suitable and mutually beneficial, the level of effort very much depends on the geographical scope of the result to be promoted, and on its relevance for local stakeholders.

Regarding the state of health in the EU, ¾ of people consider that the impact of cohesion policy is positive. This means that some investments are more popular or better perceived by the population than others when assessing the impact of the policy.

According to EU barometer, 13% of people know Interreg, which is pretty good according to a network of communication officers. TV remains the main channel of communication even though Internet is catching up.

The EU institutions are rather positive on cooperation with differentiated perspectives:
Keep on having emblematic projects at CBC scale, like the cross-border hospital in POCTEFA programme.
Transnational cooperation is something more difficult to explain for different reasons. Monitoring committees are important for convincing efforts. The macro-regional policy framework remains a top priority for the EC.

The Juncker plan is very much competitiveness oriented while the next policy should be more balanced in favour of solidarity (electro choc after Brexit and Trump election). The private sector is the one that is capable to attract and dynamise the EU economy. A great deal of progress is expected considering that €300 billon of planned funding are not spent at this stage.

### How and when to communicate results? importance of lobbying

| | |
|---|---|
| **Definition** | Lobbying is an action aiming to influence a public decision persuading individuals or groups with decision-making power to support a position you believe is right.<br><br>Note.-The territorial dimension, as a specificity of ETC, should be kept in mind. |
| **Main actors** | - EU institutions (EC, Parliament, Council of the EU),<br>- EU advisory body (Committee of Regions, represents local and regional authorities, issues opinions to the EC's proposals, EESC)<br>- Networks and multipliers<br>• Reach for advice: (CEMR, CPMR, FEDARENE, NECSTOUR, Eurocities, etc.) –<br>• Reach out to your regional office for advise |
| **The decision-making process** | Legislative process with: 1) The Commission proposal ; 2) 1$^{st}$ reading in the Parliament; 3) 2$^{nd}$ reading ; 4) Conciliation ; 5) Comitology<br><br>Be at the right place at the right time |

### The EU decision process:

| Be at the right place at the right time | |
|---|---|
| **Stages** | **Addresses for Lobbying** |
| Consultation:<br>I.   Working / Strategy paper<br>II.  Green / White Book, Communication<br>III. Online consultation<br>IV. Hearing. | • Addressing authors of documents (Commission);<br>• Attending hearing. |
| Commission proposal | • European Commission |
| Council (working group, Coreper, Council of Ministers)<br>- First Reading | • Responsible National Ministry |
| European Parliament (poss. Hearing of experts)<br>- First reading | • MEP´s in responsible committee<br>• Rapporteur<br>• Attending hearing<br>• Responsible National Ministry |
| Common position of the Council | • MEP´s in responsible committee |
| European Parliament - Second Reading | • Rapporteur |
| Poss. Conciliation procedure - 3rd reading | • Rapporteur |
| Adoption of legislation | • Responsible National Ministry |

### Key points of the discussion:

- As cohesion policy is more result-oriented over 2014-2020, there is a crucial need to showcase the results. A personal touch is very important to highlight the ETC best practise; look for a win-win situation. In the cross-border context, the emphasis should be on best practice and less on recommendation papers. In the transnational context, it should be the other way round.
- If you want to send a paper to Committee of Regions, try to target the precise committees. Try to make a person speaking the same language to contact his assistant. Look for people that ask the same questions / are concerned by the problem and who can take on board the proposed amendment.

### An example in energy efficiency

- Strategic call for energy efficiency in public buildings. The 3 successful projects of Med programme: Marie, ElihMed, Proforbiomed....) were requested to have a joint capitalisation process, where a unique policy paper with recommendations came up as one of the outputs. This policy paper takes into consideration the territorial

context of Mediterranean housing and in order to lobby in favour of southern and Mediterranean needs, the partners involved went to the Commission, Committee of Regions and European Parliament.

- It is to say that currently some of these recommendations have been considered in the EU Parliament for the new legislation on Energy Efficiency in Public Buildings. There is a possibility to change things and to see the Mediterranean concerns and vision taken on board.

**Some lessons draw from lobbying experiences by participants:**

- Bear in mind that MPs obey to their political party but also their national mandate.
- It is more difficult for a CBC project to have an influence in the decision process at the EU level. Since usually their outputs are more related to infrastructure/services, and national/regional policy but less on EU policy, however they could also impact at EU level; it is advised to collect and to valorise good stories / best practice.
- Promote the idea of convincing to your beneficiaries (together – create a community)– CBC programmes have to play a role of multiplier
- It is better to work with a group of projects within a programme or in an inter-programmes approach
- influence on regional policy – for TN policies which have a macro-regional strategy behind
- Within one thematic pole of the Danube macro-regional strategy: they organised a synergy workshop bringing together projects co-financed at CBC level; however, it is still too early to give first results.

**Key steps of the lobbying strategy:**

1. DEFINE YOUR OBJECTIVE – What is your policy proposal?
2. IDENTIFY INTERLOCUTORS – Mapping (influence – high-low / proximity high-low)
1. TIMING (we have to follow the policy agenda)
2. ALLIANCES (never lobby alone – ensure multiplying effect; it needs to represent a community)
3. PREPARATION – Lobbying means 90% of the preparatory work for 10% of effective lobbying
4. METHODS – Letters meetings (need to know the regional officers)
5. FOLLOW-UP – Keep track of the issue
6. EVALUATION – Adjust and regroup

**10 Golden Rules** for an effective Lobbying.

KNOW THE TOPIC IN DETAIL

UNDERSTAND THE PROCESS

DEFINE THE OBJECTIVES

IDENTIFY YOUR TARGET GROUPS

LOOK FOR ALLIANCES

DESIGN YOUR ARGUMENTS

ADAPT YOUR MESSAGES

BE CONCISE

FOLLOW UP ACTIVELY

BE LONG-TERM ORIENTED

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