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MORECO - Action Plan. Ex-ante evaluation and action plans.

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MORECO Ex-ante Evaluation and Action Plans

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1. Introduction

The MORECO Action plan defines the implementation and experimentation of the MORECO methodology by the project partners (PP) within seven MORECO pilot sites. In order to get a general overview on the planned pilot activities and to assure their coherence with the MORECO methodology, an ex-ante evaluation has been realized by project partner PACTE, based on an inventory of all the actions and activities planned by the project partners. This report presents the action plans of 7 pilot sites and the results of the ex-ante evaluation of the MORECO action plan and its related pilot activities.

The pilot activities will apply the defined MORECO Methodology, which aims to develop an integrated-multidisciplinary planning approach towards mobility and residential costs (the MORECO approach).

The overall aim of the pilot activities is to obtain:

- better knowledge on mobility and land use issues,
- better awareness and sensitization on strategic links between mobility practises and residential strategies of households and urban planning issues,
- better governance at different scales (from the local to European scale) and between different types of stakeholders within the pilot sites.

In accordance to MORECO methodology, the pilot activities will mainly focus on

- the experimentation and implementation of innovative tools, facilitating awareness rising and the integration of concerns of Mobility and Residential Costs into local/regional governance,
- the stimulation of new local/regional governance dynamics by fostering the sensitization of the local/regional stakeholders and stimulating new cooperation between them.

1.1. MORECO Target Groups

The MORECO pilot activities foresee the implementation and experimentation of the MORECO methodology, using innovative tools which have especially been developed for the MORECO project and focusing on three target groups:

1. Households and related sub-groups, such as residential construction companies, banks and Housing subsidy bodies, including counselling services.
Tools: Cost calculator (CC), stress-test, smartphone-app, GIS, seminars, brochures etc.
2. Spatial Planners and mobility actors (= planners, transport providers, consultants, planning authorities)
Tools: Informational maps, based on Geographical Information System - GIS
3. Policy-Makers (= politicians, approving or law preparing authorities)
Tools: guideline and training/consultant tools, as communication media

1.2. MORECO Governance-approach

Beyond the mere implementation and experimentation of the MORECO tools, the pilot activities will pay attention to governance issues within the pilot sites.

As already indicated, the tool implementation is supposed to stimulate new local/regional governance dynamics. A minima, the pilot activities will sensitize local/regional stakeholders for MORECO issues. In best case, new cooperation between the stakeholders and new forms of governance will come out of the tool implementation process.

The project partners are supposed to consider the issue of "governance" in a triple manner:

- Pay attention to the specific local/regional governance context and practices in each PP's pilot sites (existing local/regional governance *context* of the MORECO tools implementation and use),
- reflect on the way MORECO tools may be best implemented in these specific governance contexts (MORECO tools *within* the local/regional governance context),
- make sure that MORECO tools constitute an effective contribution to the existing governance and decisional processes (MORECO tools *for* the local/regional governance).

The pilot activities correspond to three levels/steps:

- Adaptation of the tools to the local context (i.e. in adequacy with local regional statistics) and implementation of the tools (to make the tool work),
- Make sure that the tools are used by the local/regional stakeholders (by collaborating with the local/regional stakeholders),
- Identification of the effective impacts of the MORECO methodology on decision, debate, perception, governance processes ... (what does it change, why and how?).

2. MORECO Pilot Sites

The MORECO project includes seven pilot sites within four countries:

	Pilot site	Country	Project Partner
1	City of Salzburg and District Salzburg Umgebung	Austria	SIR/ISpace
2	City of Munich and Munich Transport and Tariff Association Area	Germany	MUC
3	Val Belluna and Val Boite e Ciento Cadore	Italy	PBEL
4	City of Mantova and Mantova Hinterland	Italy	PMAN
5	Union of Mountain Municipalities of Pinerolese Area (Piedmont)	Italy	UNCEM
6	Urban Municipality of Novo Mesto and Jugovzhodna Slovenija	Slovenia	UIRS
7	Alpine Corridor - Genève-Valence	France	RALPS

3. Ex-ante Evaluation

The foreseen pilot activities have been evaluated during autumn 2012 by PP PACTE.

3.1. Aim of the Ex-ante Evaluation

This evaluation aimed at:

- ensuring close reference of actions to methodology and to tool-frameworks,
- providing a comparable overview and documentation of pilot actions in WP6 for all partners,
- ensuring close reference of actions to Application form AF,
- serving as a basis for further evaluation of the pilot activities (in WP5 ex ante + in WP7) ,
- providing all necessary information to set up a transnational MORECO GOVERNANCE POLICY (in WP7), based on the results of the action plans.

3.2. Evaluation Method

The ex-ante evaluation of the pilot sites has been realized in two distinctive steps:

1. Collection of information in order to make an inventory of the pilot activities planned by the project partners within their respective pilot sites. This collection has been based on two successive and complementary questionnaires:

A first questionnaire on the planned pilot activities had to be filled in by the PP's (spring 2012, see appendix 1).

An additional survey had been launched in order to assure that the pilot activities might be monitored and evaluated during and after the implementation process (autumn 2012, see appendix 2).

2. Creation and analysis of a common data basis on the PP's pilot activities (on basis of the additional survey) with three complementary purposes:

A. Creation of an operational tool in order to allow and facilitate the follow-up of the implementation of the pilot activities by the PP's

B. Creation of a shared framework allowing to evaluate the pilot activities all along, regarding three types of indicators :

- AF quantitative activity indicators,
- Qualitative indicators addressing tool implementation and governance issues,
- Qualitative outcome indicators, allowing to evaluate and critically assess the pilot activities.

C. Creation of a basis for a comparative analysis of pilot activities within the different pilot sites, regarding the different issues and objectives of the MORECO methodology and aiming at elaborating a transnational MORECO governance approach (WP6 and 7). This comparative analysis will aim at:

- Activity evaluation, based on the quantitative indicators of the Application Form (AF),
- Efficiency evaluation, based on the qualitative indicators (in order to appreciate usefulness of tools),
- Medium and long term impact evaluation of the use of MORECO tools and governance.

The data base on the PP's activities and associated tasks is intended to be completed by the project partners all along the implementation phase of their action plan.

3.3. The Collected Data

The pilot activities of all seven pilot sites are described in detail in the common MORECO pilot

activities database. The following information have been gathered:

The pilot activities per site and partner, including information on the concerned WP and the period of its implementation.

A synthetic description of each activity (eventually differentiated by steps/actions), including the description of:

- the concerned target group(s),
- the main objective(s),
- the type of tool(s) which will be used.

Quantitative indicators as mentioned in the Application Form (AF). (Most of indicated values are still estimations. They will progressively be replaced by effective values).

Qualitative indicators related to the implementation of the actions. They will be completed during the WP6 phase.

Qualitative indicators conceived to evaluate the effects of MORECO tools and methodologies on transport and urbanization governance processes. These indicators and results will be used in WP7.

Table 1: Informational structure of the pilot activities

Activities and steps	
Code	MUC-1-a (example)
PP	MUC
Activity number	1
activity	Stress tests
action number	a
action number	Investigation of future housing and mobility costs in the Munich region...
referred to AF action n°	5.1, 6.1 to 6.5
Starting date	1/11/11
Closure date	30/11/12
Characterization of the action	
Main target group	Civ. soc.+Dec.mak.
Main objective	Sensitization
Main used tool	Cost calculator
Quantitative and AF indicators	
Output Indicators	
Number of actions matching mobility needs and mobility offers for all groups of society	
Number of actions for integrated traffic and mobility planning and multimodal transport	
Number of actions aiming at offering ICT based public services (e-health, e-government, e-learning, etc.)	
Result Indicators	
Number of transport authorities/mobility operators involved in activities resulting from the project	2
Networking of mobility actors and stakeholder on formal basis beyond the project duration	yes
Does your project unlock public investments other than the project co-financing?	no
Does your project unlock private investments other than the project co-financing?	no
I&P Indicators	
Number of media appearance (printed press, radio, TV)	2
Number of participants to public project events	50
Nb of produced and disseminated project publications	200
Qualitative and implementation indicators	
planned objectives	elaborate striking arguments to show the advantages of the MORECO findings ; promotion of the MVV-cost calculator
Implementation context	
outcome	enlargement of the information given by the already existing Munich cost calculator
Target group – with whom (actors)?	all groups, especially municipalities and house hunting households
Way of use? How is it used? (for sensibilisation, cooperation...)	mainly sensibilisation
Qualitative indicators about impacts of activities	
What did your activities change within regional governance and planning practices	
Impact on knowledge about MORECO issues	
Impact on behaviour of the target group and other stakeholders	
Impact on awareness of MORECO issues	
Impact on relations between stakeholders	
Lessons learnt	
Shortfalls, remaining blocking points, risks, political or reglementary deficits	
Good results, recommandations, political or reglementary opportunities	

3.4. Classification of the Pilot Activities

The pilot activities and associated actions (or tasks) are in line with the objectives and methodology of the MORECO project. Nevertheless, specific conditions in the pilot sites (i.e. governance and planning issues) lead the project partners to set up actions which are adapted to the specific regional context. Approaches then may vary. For example, a particular MORECO tool may be applied to more target groups than initially planned. Moreover, the use of a same tool may have different purposes depending on the pilot site (e.g. awareness rising or fostering new governance).

In order to obtain an overview and to produce a global analysis of the action plans, a classification of the planned actions/tasks, corresponding to the pilot activities, has been established on the basis of three criteria: main target group, main objective, main tool used. In order to take into account particular cases, additional or mixed categories have been created. The table below indicates the established classifications:

MAIN TARGET GROUPS

Households	<i>households, househunter households, web-users, associations of inhabitants ...</i>
Policy makers	<i>mayors, local or regional decision makers, transport authorities...</i>
Planners and experts	<i>planners, transport experts and transport providers, journalists, scientists, NGO ...</i>
Private actors	<i>bankers, building companies, ICT companies ...</i>
All of them	

MAIN OBJECTIVES

Sensitization	<i>awareness, communication, promotion ...</i>
Expertise	<i>methodological or technical implementation, experimentation, knowledge increase, analysis, modelling, monitoring ...</i>
Cooperation	<i>partnership, governance, lobbying ...</i>
Transfer of know-how	<i>training, workshop, support, guideline, seminar, good practises exchange, adaptation to pilot site ...</i>
Services	<i>Web consulting, counselling, decision making aid, car pooling ...</i>

MAIN USED TOOLS

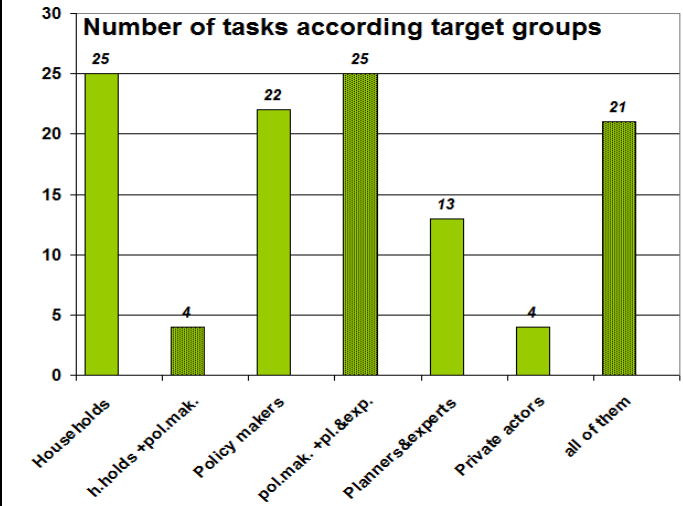
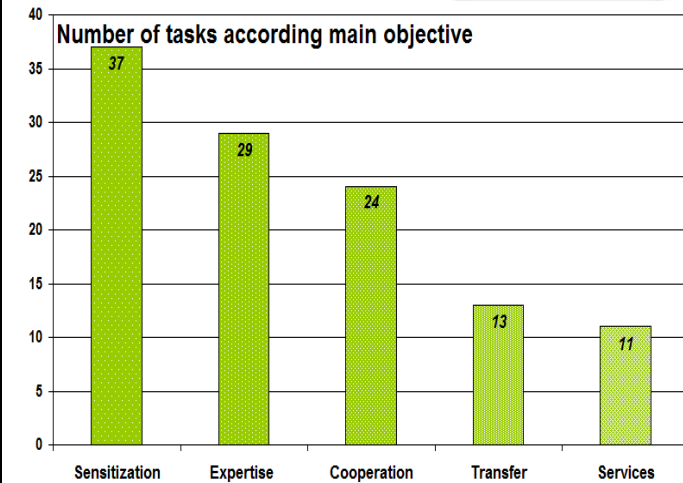
Cost calculator	<i>Cost calculator, stress test ...</i>
GIS	<i>GIS, cartography ...</i>
Communication tools	<i>Supports for communication, white book, tools or methodologies for governance, meeting, sensitization ...</i>
Other tools	<i>ICT tools, web service, analysis, regulations, proposal ...</i>
Several of them	<i>MORECO tools all together</i>

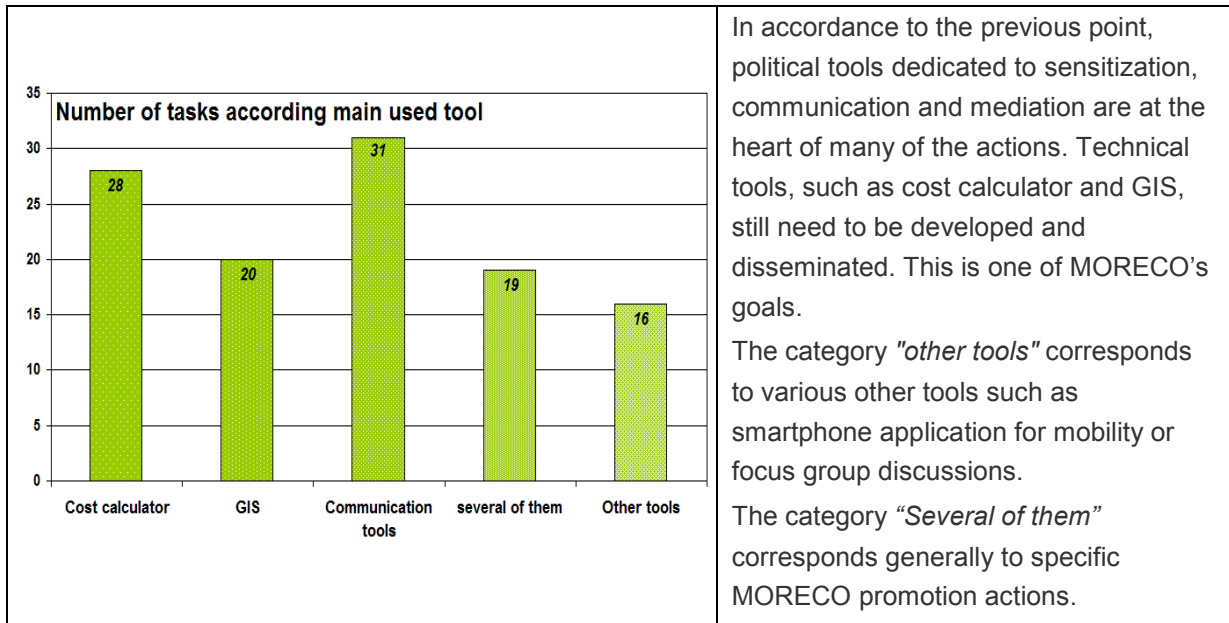
3.5. Analysis of the MORECO Pilot Site Actions

All in all, 120 actions/tasks linked to 30 major pilot activities have been identified within the seven pilot sites. Some pilot activities are concerned by a single action; others integrate up to 8 actions/tasks. Thus, all indicted actions do not correspond to the same amount of work.

The three graphs below show the distribution of actions according to the three criteria (target groups, objective and used tool). They give some meaningful information about the very nature of the pilot actions/tasks.

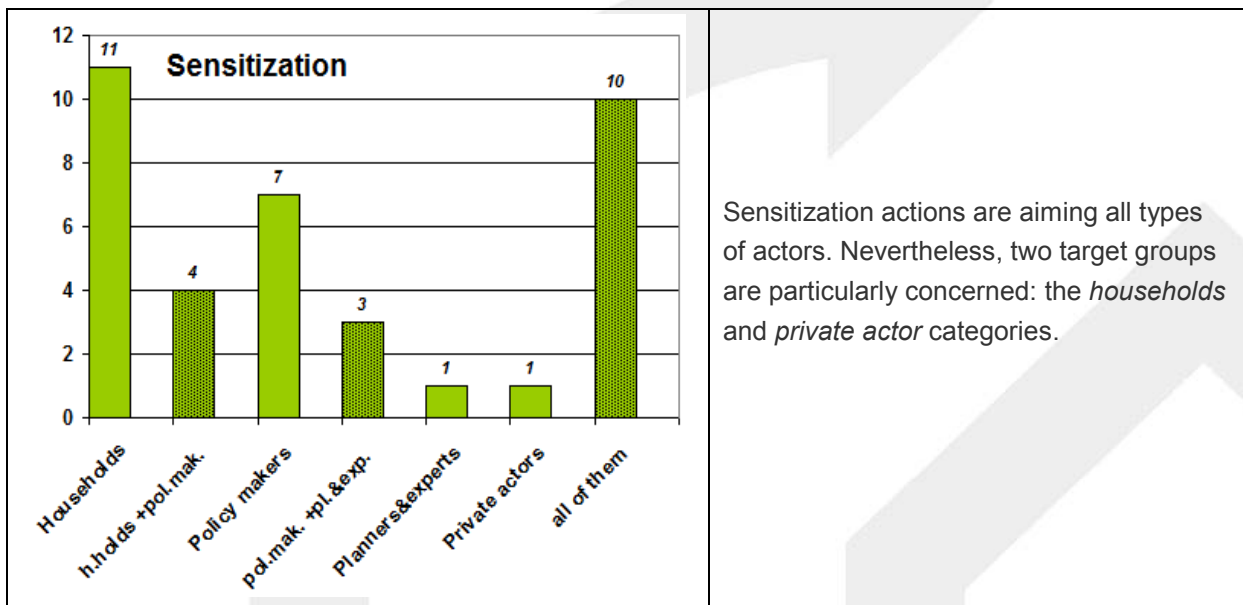
Table 1: Characteristics of the pilot activity actions

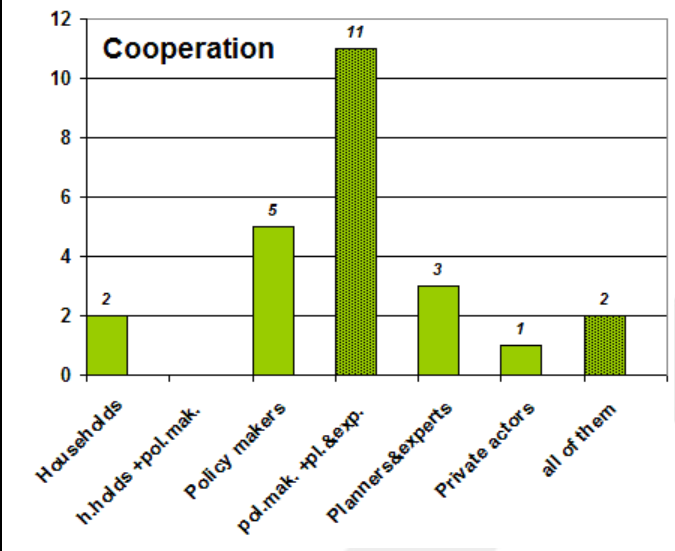
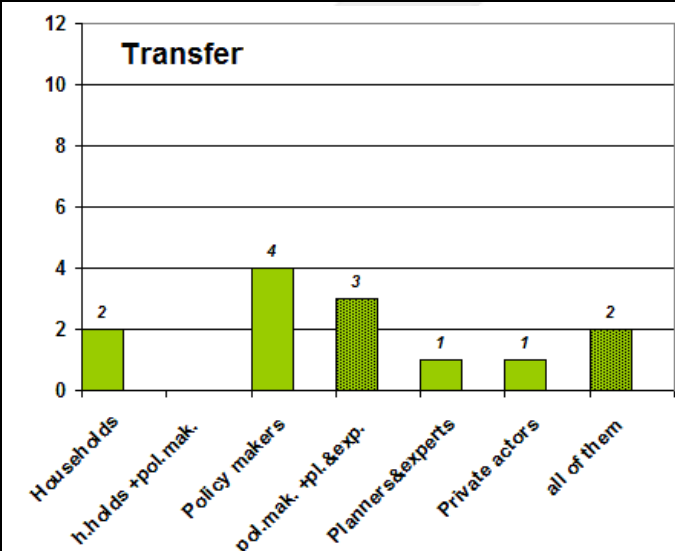
 <p>Number of tasks according target groups</p> <table border="1"> <thead> <tr> <th>Target Group</th> <th>Number of Tasks</th> </tr> </thead> <tbody> <tr> <td>House holds</td> <td>25</td> </tr> <tr> <td>h.holds + pol.mak.</td> <td>4</td> </tr> <tr> <td>Policy maker's</td> <td>22</td> </tr> <tr> <td>pol.mak. +pl.&exp.</td> <td>25</td> </tr> <tr> <td>Planners&experts</td> <td>13</td> </tr> <tr> <td>Private actors</td> <td>4</td> </tr> <tr> <td>all of them</td> <td>21</td> </tr> </tbody> </table>	Target Group	Number of Tasks	House holds	25	h.holds + pol.mak.	4	Policy maker's	22	pol.mak. +pl.&exp.	25	Planners&experts	13	Private actors	4	all of them	21	<p>While <i>households</i> and <i>private actors</i> are mostly treated as distinct target groups, <i>policy makers</i> and <i>Planners & experts</i> are very often addressed together within a single action. Politicians and “their experts” thus appear as a kind of “decisional couple”. Economic actors only are a sub-target group.</p>
Target Group	Number of Tasks																
House holds	25																
h.holds + pol.mak.	4																
Policy maker's	22																
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 <p>Number of tasks according main objective</p> <table border="1"> <thead> <tr> <th>Main Objective</th> <th>Number of Tasks</th> </tr> </thead> <tbody> <tr> <td>Sensitization</td> <td>37</td> </tr> <tr> <td>Expertise</td> <td>29</td> </tr> <tr> <td>Cooperation</td> <td>24</td> </tr> <tr> <td>Transfer</td> <td>13</td> </tr> <tr> <td>Services</td> <td>11</td> </tr> </tbody> </table>	Main Objective	Number of Tasks	Sensitization	37	Expertise	29	Cooperation	24	Transfer	13	Services	11	<p>The MORECO methodology clearly appears as an upstream and experimental approach. Most emphasis is made on sensitization and aware-ness rising of the various actors, on the improvement of knowledge, the initiating of cooperation, and, less often, on the knowledge transfer and implementation of operational services.</p>				
Main Objective	Number of Tasks																
Sensitization	37																
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Cooperation	24																
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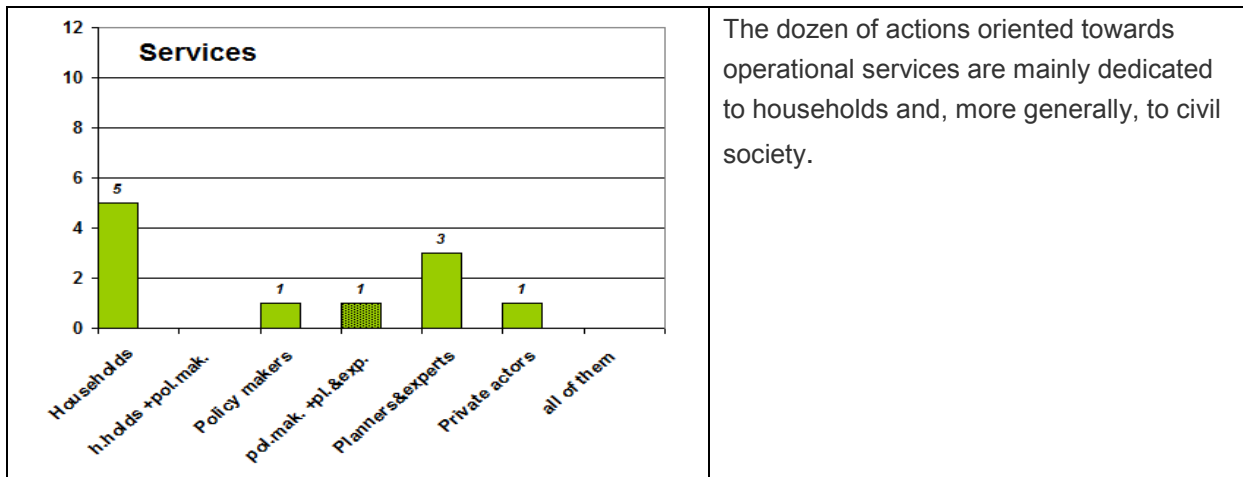


The objectives of the actions differ according the concerned target groups, as shown in the graphs below. Enable to see that this hypothesis can evolve from one objective to the other.

Table 2: Objectives of the pilot activity actions

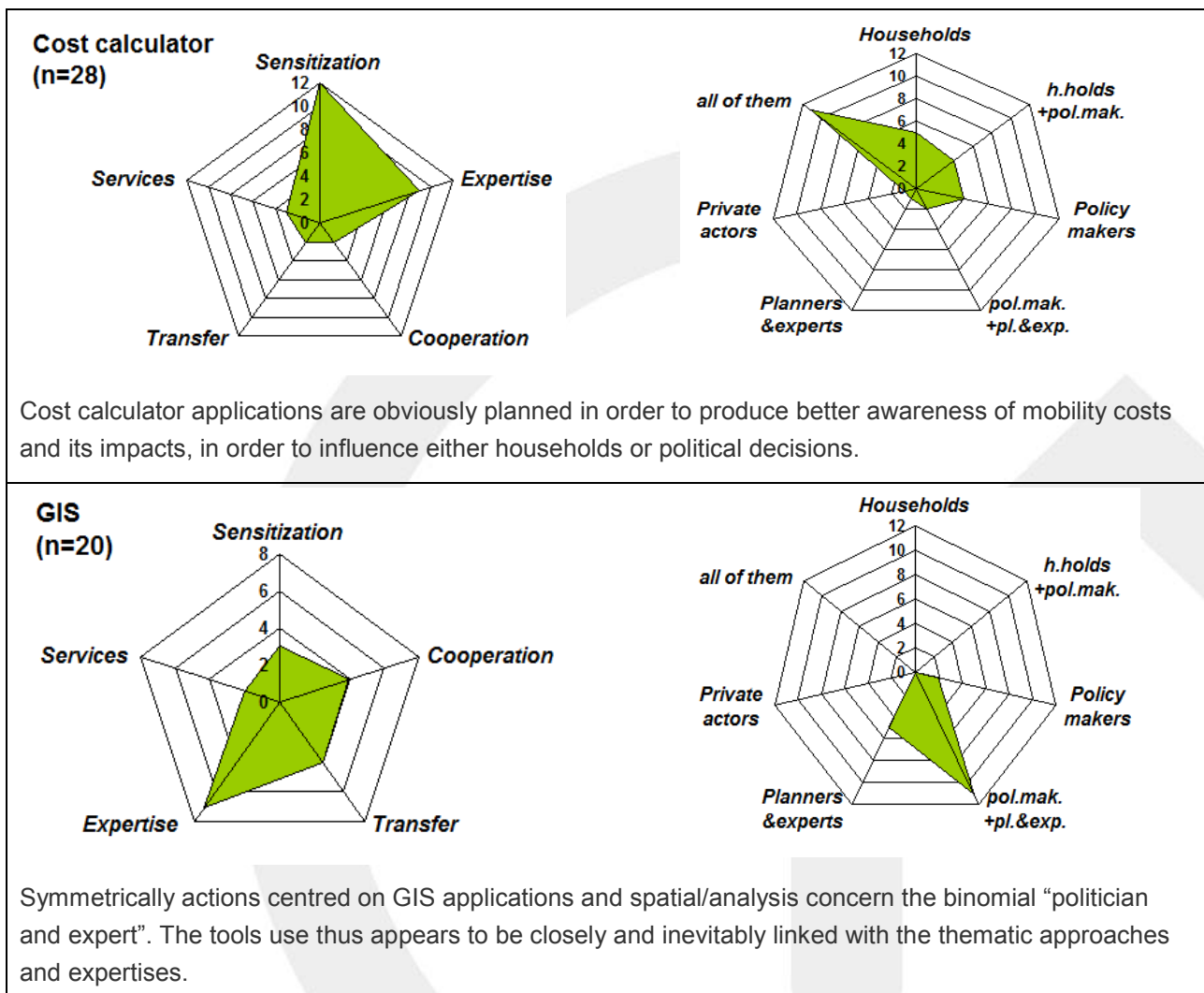


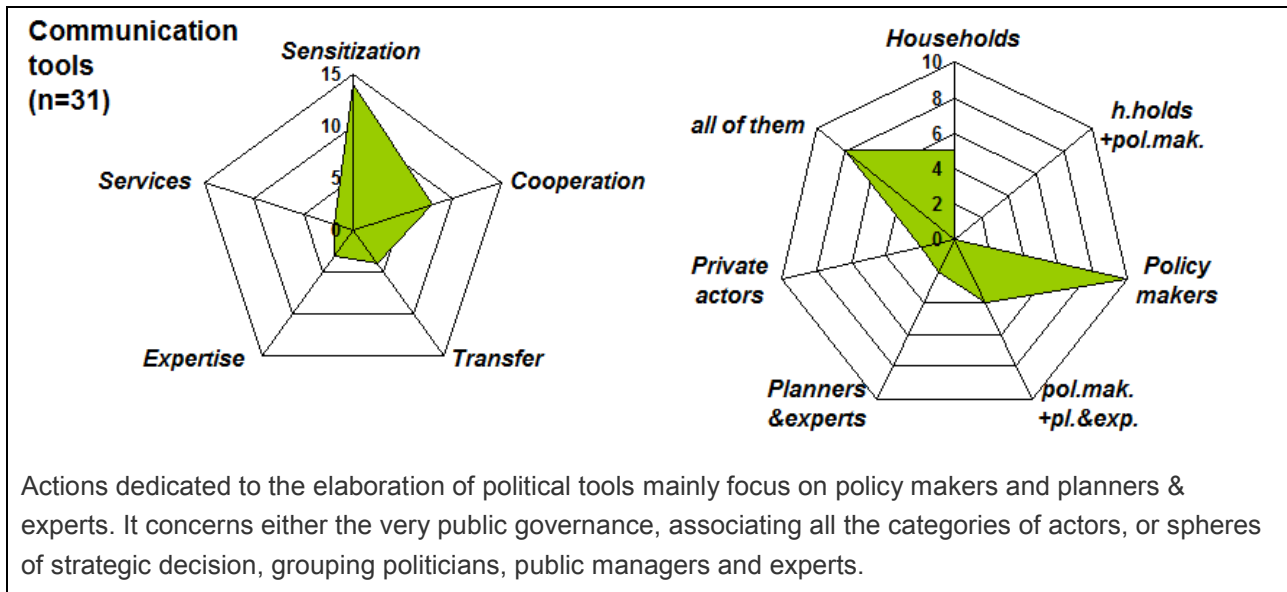
Expertise	Cooperation	Transfer															
 <table border="1"> <caption>Expertise Data</caption> <thead> <tr> <th>Target Group</th> <th>Count</th> </tr> </thead> <tbody> <tr><td>Households</td><td>5</td></tr> <tr><td>h.holds +pol.mak.</td><td>0</td></tr> <tr><td>Policy makers</td><td>5</td></tr> <tr><td>pol.mak. +pl.&exp.</td><td>7</td></tr> <tr><td>Planners&experts</td><td>5</td></tr> <tr><td>Private actors</td><td>0</td></tr> <tr><td>all of them</td><td>7</td></tr> </tbody> </table>	Target Group	Count	Households	5	h.holds +pol.mak.	0	Policy makers	5	pol.mak. +pl.&exp.	7	Planners&experts	5	Private actors	0	all of them	7	<p>Expertise actions are mostly dedicated to the policy makers or/and Planners&experts. They are very often concerned together, but never in association with other target groups, such as the households and private economic actors. This observation leads to think that concerned actions referred to different kinds of expertise.</p>
Target Group	Count																
Households	5																
h.holds +pol.mak.	0																
Policy makers	5																
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Target Group	Count																
Households	2																
h.holds +pol.mak.	0																
Policy makers	5																
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Target Group	Count																
Households	2																
h.holds +pol.mak.	0																
Policy makers	4																
pol.mak. +pl.&exp.	3																
Planners&experts	1																
Private actors	1																
all of them	2																



In order to analyse the use of the MORECO tools in terms of target groups and objectives, the graphs below compare the use of the three MORECO tools and point out differences and complementarities.

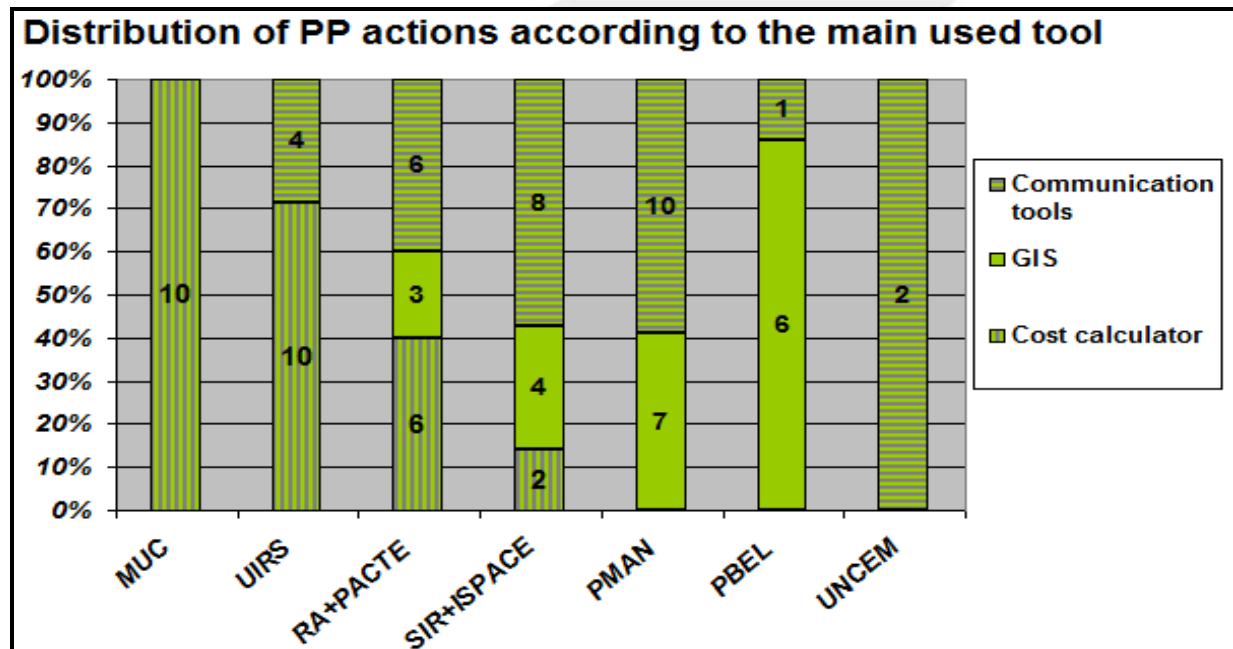
Table 3: Use of the MORECO-tools





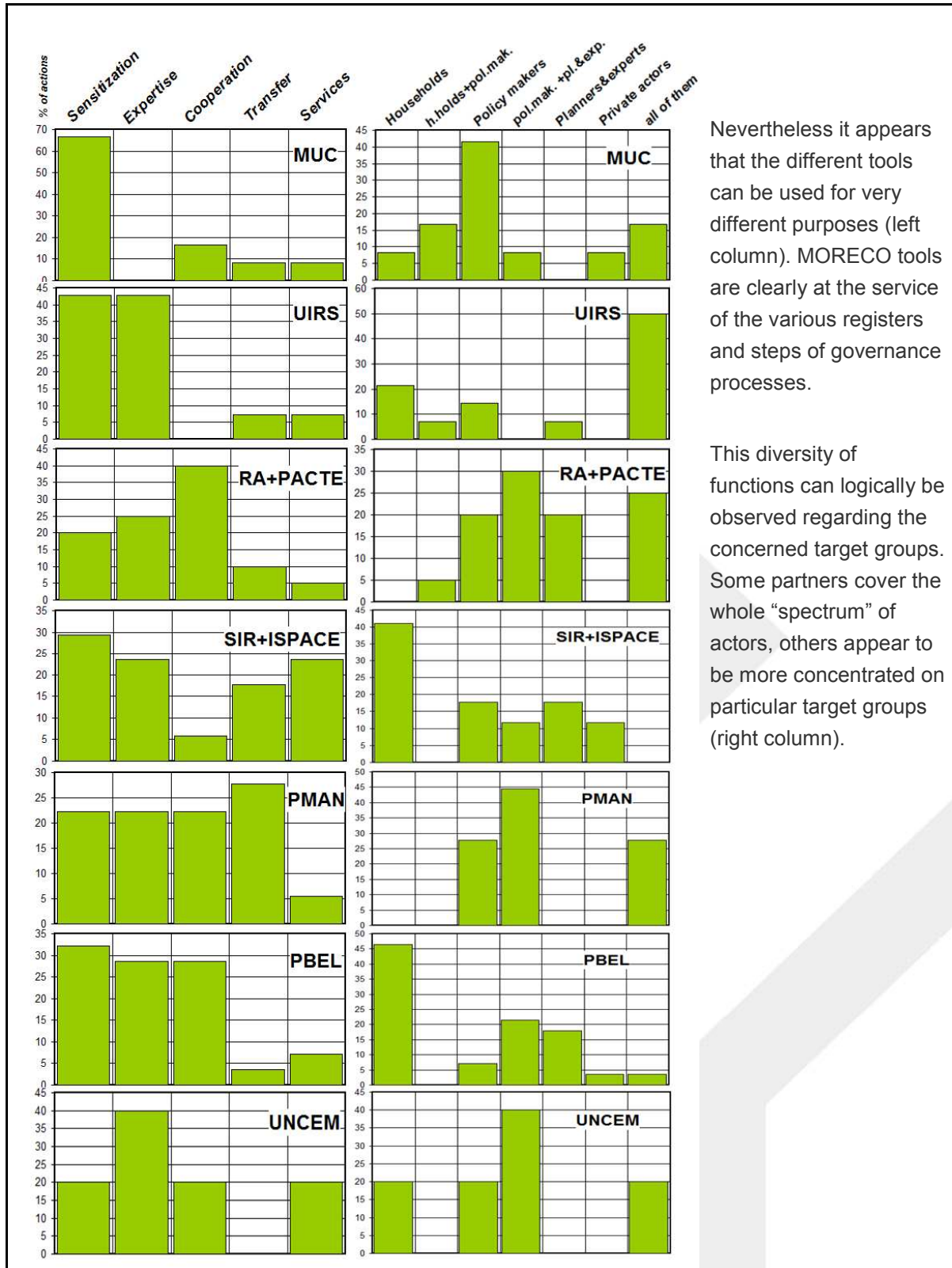
The last graph points out the PP's use of the MORECO issues. The diversity of the partners in terms of status, competencies and interests is clearly an opportunity for improving the efficiency of tools within governance processes.

Table 6



A real difference and complementarity between more *technically* and more *politically oriented* project partners can be observed. GIS is an intermediate approach, mixing technical expertise and more qualitative methodologies for governance.

Table 7: Objectives and target groups per pilot site



Nevertheless it appears that the different tools can be used for very different purposes (left column). MORECO tools are clearly at the service of the various registers and steps of governance processes.

This diversity of functions can logically be observed regarding the concerned target groups. Some partners cover the whole “spectrum” of actors, others appear to be more concentrated on particular target groups (right column).

4. Conclusion

In summary, the analysis of the characteristics of the 120 actions constituting the action plans confirm close reference to the MORECO methodology and its three complementary objectives:

better knowledge on mobility and land use issues,

better awareness and sensitization about strategic links between mobility practises and residential strategies of households and urban planning issues,

better governance at different scales and between different types of stakeholders within the pilot sites.

Considering the target groups, we can retrieve the different aimed categories : households, experts, political decision makers, and private stakeholders involved in transport and housing. Some evolutions can be observed regarding the initial orientations:

The first observation does concern the range of stakeholders:

Many actions are dedicated simultaneously to planners and political decision makers. This observation is valid for all the partners and seems to show that the duo «planner & expert/politican» is a common figure.

According to the foreseen activities and regional contexts, some new types of stakeholders, which have not been identified initially, have been added by the PP's, such as other types of experts: journalists, academic scholars or specialized associations. Also new types of private actors have been identified

This diversification of the range of stakeholders is the result of the action planning process of the PPs and should be seen as an enrichment of the MORECO project.

The second observation is related to the use of the tools within the pilot sites. In fact, the three initially foreseen MORECO-tools (cost calculator, GIS-maps and communication tools) are at the heart of the pilot activities of all PP's. Here again, the range has been enlarged by complementary tools and methods, especially concerning the use of internet and new communication technologies.

The main objectives of the MORECO project are clearly pursued by all pilot activities. The data base allows a differentiated analysis:

- Sensitization/awareness rising (31 % of all 120 actions) is the most frequent type of action and aims all stakeholders equally.
- Expertise actions (24 %) are mostly dedicated to policy makers or/and planners & experts.
- Cooperation in order to foster new forms of governance integrating MORECO concerns is an important issue (20 %).
- Transfer of knowhow corresponds to a few numbers of actions (11 %) and is mainly addressing policy makers and planners & experts.
- Finally, the actions oriented towards operational services (9 %) are mainly dedicated to households and, more generally, to civil society.

The data basis which has been elaborated on the basis of the survey reveals close reference of actions to the Application Form AF. It provides a comparable overview and documentation of pilot actions in WP6 for all partners. It shall be used as an open source to ensure transparency. It also shall allow the PP's to adjust actions during the implementation phase of the pilot activities.

Moreover, the data basis has been constituted in a manner that allows it to serve as a basis for evaluation during and after the implementation phases (WP6 and WP7). A set of qualitative indicators allowing to assess the experimental process and its outcomes will be filled in by the PP's during and after their pilot activities. It should thus provide the basic information for the setting up of a transnational MORECO GOVERNANCE POLICY (WP7) and the MORECO white book.

5. Appendices

5.1. Annex 1: Questionnaire “Pilot Activities”

5.2. Annex 2: Pilot Activities Additional Questionnaire

5.3. Annex 3: Action Plans of 7 Pilot Sites

5.4. Annex 4: Overview of Pilot Actions