

Załącznik nr 5

SUCCESS ROAD

Staff Exchange Programme: Proposed Methodology for the implementation of the On-line Staff Workshops

Project Title	<i>Enhance the Competitiveness and Sustainability of European SMEs through Succession Procedures and Models</i>
Project Acronym	<i>SUCCESS ROAD</i>
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Project Partners	
LP (PP1)	<i>Ministry of Development and Investments (GR)</i>
PP2	<i>European Confederation of the Footwear Industry - CEC (BE)</i>
PP3	<i>Lithuanian Innovation Center - LIC (LT)</i>
PP4	<i>Valencian Association of Footwear Entrepreneurs - AVECAL (ES)</i>
PP5	<i>Hellenic Clothing Industry Association - HCIA (GR)</i>
PP6	<i>The Valencian Institute for Entrepreneurial Competitiveness - IVACE (ES)</i>
PP7	<i>Mazovia Development Agency Plc - ARM (PL)</i>

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Introduction

The interregional exchange of experience constitutes the cornerstone of the project “Enhance the Competitiveness and Sustainability of European SMEs through succession procedures and models” with the acronym “Success Road”, funded by the European Interregional Cooperation Program “Interreg Europe 2014-2020”.

The project’s overall objective is to help project national and regional authorities implement policies and new succession measures in their operational programmes so that SMEs can better face the succession phase and secure their future after a change of ownership.

Through a well-thought approach project partners are working in a coordinated way with a view to:

- ⇒ Diffuse knowledge within the participating organizations, as well as to external stakeholders.
- ⇒ Ensure that each learning activity is well thought through and of high quality in terms of preparation, implementation and follow up.
- ⇒ Ensure that an integrated approach is adopted, so that each single activity is logically combined with another and a clear path for learning is designed within the project.

The new circumstances formulated by the COVID-19 pandemic, have been identified as a critical factor that could entail a direct and severe impact on interregional cooperation, interfere with the implementation of the project activities and disturb the progress of the project (administrative, organisational constraints). Despite the adverse circumstances and the restrictions in force on travelling and working, the partnership's work has not been significantly affected.

Facing the challenge to deal with the need to introduce any necessary change, so as to mitigate the potential impact on the “Success Road” implementation, partners have co-decided to move the substantial and fruitful activity of cooperation and exchange, in virtual mode. All related face-to face work-trips and events that couldn't be implemented physically, have been thus replaced by distance on-line meetings.

Within this context and in order to proceed with the implementation of the Staff Exchange Programme, the contingency measure that has been commonly agreed by partners and approved by the Interreg Europe Secretariat, is the conduction of four (4) On-line Staff Workshops. The implementation of the Workshops shall abide by the core principles of the initially envisaged Staff Exchange Programme, in order to boost the transfer of knowledge, skills & expertise and strengthen the lessons learned for the key staff of partners.

The aim of this document is to develop an alternative methodology so as to carry out efficiently the Programme in the form of On-line Staff Workshops. The proposed methodology is based on an Interreg Europe best-practice -emerged from the “Scale Up” project consortium-, that has been adjusted to the “Success Road” scope and activities.

A. On-line Staff Workshops: Overview of the methodology

The objective of the On-line Staff Workshops is to facilitate and urge the exchange of experience and best-practices among partners' key staff with regard to business succession and transfer policies, as an integrated part of the interregional learning process that is fostered by the "Success Road" project.

For the implementation of the Workshops, there will be two different roles to be attributed to project partners: a) Hosting partner and b) Visiting on-line partners. Considering that the Staff Exchange Programme has not been carried out during Phase 1 "Interregional Learning" of the project, neither during the 2nd semester nor during the 3rd semester, partners -apart from the Advisory Partner PP2- European Confederation of the Footwear Industry and - will undertake both roles.

The outmost characteristic of this proposed methodology is the idea of acquiring extensive information and clarifications in advance of the conduction of the workshop from the hosting partner and the good practice owners.

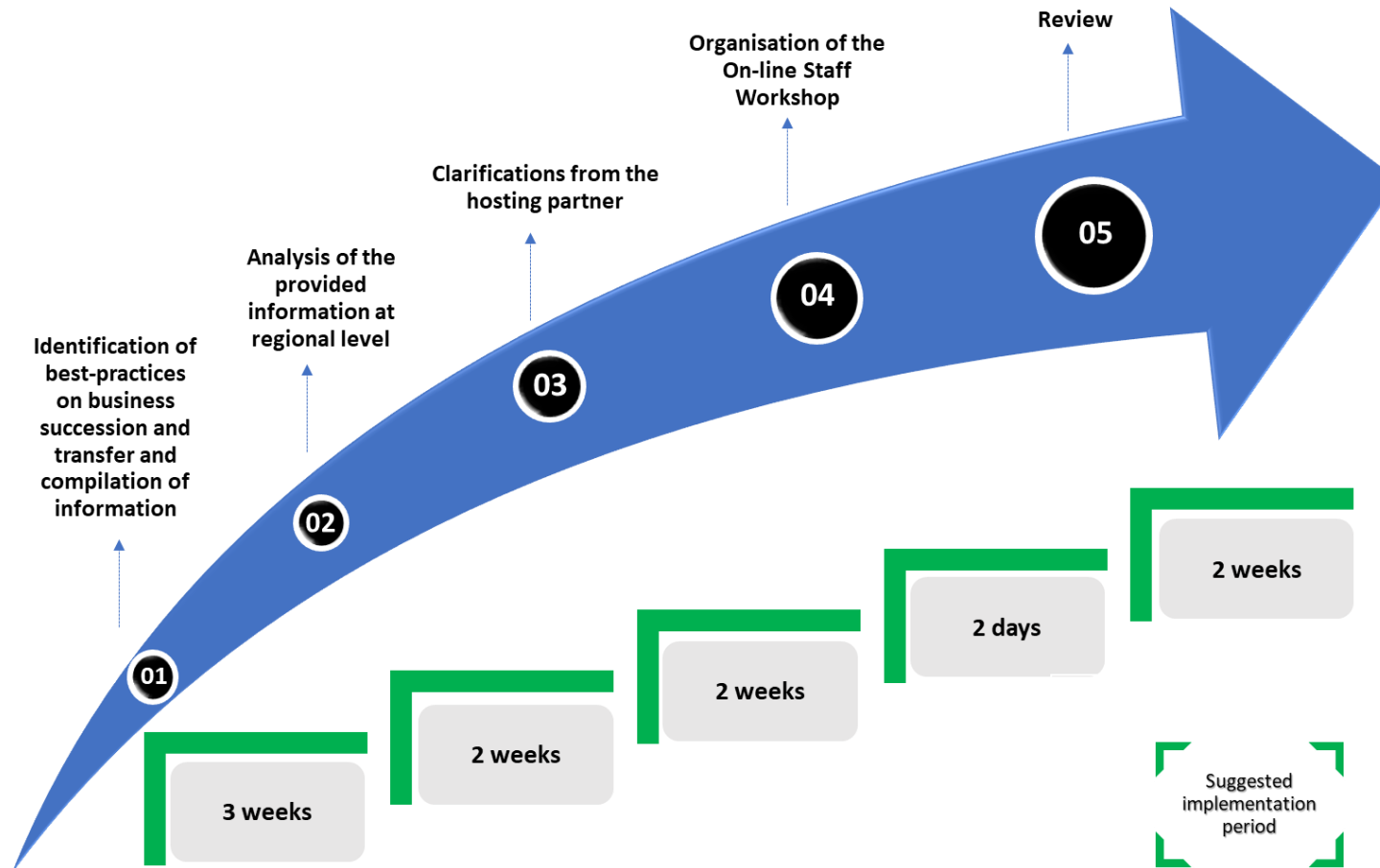
Within this framework, the *hosting partner* will be in charge of identifying and compiling information about a series of best practices that have been developed in his territory, with regard to:

- ❖ The reformation and improvement of the national institutional and legal framework.
- ❖ The development of structures and mechanisms that support *inter alia* the planning and preparation of a succession plan, facilitate the matching among transferors and successors, urge the preparation and training of founders and successors and provide tools for the prevention and management of the conflicts within the (family) business among founders and successors.
- ❖ The deployment of successful awareness campaigns addressed to the business community.

Visiting partners will have to analyze the information provided by the hosting partner in collaboration with the respective stakeholder group, make further questions to hosting partners and check the potential transferability of best practices in their regions.

The proposed methodology for the preparation and conduction of the On-line Staff Workshops, comprises five (5) distinct phases of implementation, that are depicted at the following graph. Each of the phases is thoroughly described below.

On-line Staff Workshops: Phases of implementation



B. Phases of preparation and organization of the On-line Staff Workshops

B.1 Identification of best-practices on business succession and transfer and compilation of information

Each hosting party must identify and compile information about at least two best practices that have been evolved in regional or/and national level aiming at securing smooth completion of the business succession / transfer process.

Some indicative -and non-exhaustive- areas of research and policy-making from which the related best-practices may derive, include the following:

- ✓ Reforms and improvements of the institutional and legal framework, focusing on the provision of the required conditions for the simplification of procedures, the reduction of the tax burden and the introduction of incentives for the adoption of succession and transfer practices.
- ✓ Integrated practices fostering changes on the business mentality, mainly of small and medium-sized family businesses that counter the solution of succession from generation to generation as the unique way out and ignore the possibility of transfer to a third person inside and outside the company (family rule).
- ✓ Development of organized frameworks of support services, including the preparation, consulting support and guidance of companies at all stages of succession / transfer that could be implemented in various forms (face-to-face, electronic platforms, support points, teleconferencing, etc.). Such services may include the preparation of a succession plan, finding and selecting successors / buyers, training of successors, personalized support through mentors for a smooth transition to new roles, the use of intermediaries to prevent or resolve conflicts between founders and successors / buyers.
- ✓ Specialized training and counseling actions for founders and successors.
- ✓ Policies strengthening the system of governance and policy-making. Such actions can be sectoral action plans, Succession / Transfer Monitoring Observatory, development and pilot implementation of standard tools to support succession / transfer, creation of a register of mentors and intermediaries, etc.
- ✓ Examples of successful activation and mobilization initiatives, information actions and consultation with intermediate stakeholders, who can participate as beneficiaries in the implementation of actions to promote succession / transfer. Such bodies can be business bodies, higher education institutions, development, advisory, research bodies, etc.

The information could be presented through different and complementary tools:

- Reports
- Websites
- Video
- Recorded interviews with best-practices owners or beneficiaries
- Other

The criteria to select information would be to identify materials needed as qualitative data that could be considered as relevant if they were to implement the best practice themselves from scratch.

Hosting partner would provide all the relative information in English. If a key document which is basic for the best-practice transfer is not possible to be translated, the partner will committee to provide the key information in a summary or by the easiest and most efficient way. Each hosting partner will nominate a person as a coordinator of the On-line Staff Workshop, while the visiting partners shall nominate the representatives of their staff that shall attend the Workshop.

Each Hosting Partner will create a folder on the common Google Drive folder to archive all the information concerning the implementation of each On-line Staff Workshop.

Duration: Three (3) weeks

B.2 Analysis of the provided information at regional level

As soon as the visiting partners receive the best-practices overview along with the back-up material from hosting partner, they will share it with their Stakeholders Groups and will jointly proceed with its in depth analysis. The underlying idea is to check the potential transferability of the good practice in their regions.

During the phase of analyzing additional information, partners and their Stakeholders Groups could have further questions to be addressed to the hosting partner and good practice owners, asking thus for further details.

The Hosting Partner will create a form to be updated in Google Drive where partners could add their questions addressed to the best-practice owner. The Hosting Partner will review the document and reorganize it in a structured way to make it simply and easy to fill in by the owner of the best practice.

Duration: Two (2) weeks

B.3 Clarifications from the hosting partner

The Hosting Partner will share the questions with the best practices' owners.

The hosting partner will compile all the answers and upload the document in Google Drive. Then, the rest of partners will analyze the answers provided by hosting partners, in collaboration with their Project Team, Experts and/or Stakeholders Group members.

Duration: Two weeks

B.4 Organization of the On-line Staff Workshop

Once the previous phases have been completed and project partners have enough information about the best practices, the host partner shall organize a 2-day On-line Staff Workshop, while representatives of the visiting partners shall participate.

At this stage of the proposed methodology, the good practices shall be further expounded on, by the good practice owners themselves. The proposed duration of each session of the workshop is 3 hours.

The organization of the On-line Staff Workshop includes the following steps:

- Ensure hosting on an online platform.
- Preparation of the list of the representatives of the visiting partners that will be invited to participate
- Preparation of a detailed agenda for the Staff Workshop.
- Preparation and dissemination of the invitation for the Staff Workshop.
- Publication of Press Releases after the end of the Staff Workshop.
- Technical and secretarial support during Staff Workshop.
- Video recording of the Staff Workshop.

Duration: Two days

B.5 Review on the On-line Staff Workshop

In the aftermath of the implementation of each Workshop, the hosting partner shall conduct an online survey to evaluate the results of the activity.

Visiting partners should fill in an Excel file with a short SWOT Analysis, so as to check the potential transferability of each Best Practice into their regions, in terms of shaping a business-friendly legal and institutional ecosystem that creates incentives, removes barriers to entrepreneurship and offers new tools that help business owners withstand the succession

process. This is the starting point that shall lead to the selection of the best-practices to be included in the national Action Plans which will introduce realistic policy proposals and measures for the smooth completion of the business succession / transfer process.

Duration: Two weeks

C. Gantt Chart for the preparation and organization of the On-line Staff Workshops

Success Road: On-line Staff Workshops	Hosting Partner	PHASE 1 "Interregional learning "											
		Semester 4						Semester 5					
		2021						2021					
		Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	2022 Jan
1. On-line Staff Workshop in Athens	PP1 - G.S.I. - MIN.DEV.IN., PP5 - HCIA												
Identification of best-practices on business succession and transfer and compilation of information													
Analysis of the provided information at regional level													
Clarifications from the hosting partner													
Organisation of the On-line Staff Workshop													
Review of the On-line Staff Workshop													
2. On-line Staff Workshop in Poland	PP7 - ARM SA												
Identification of best-practices on business succession and transfer and compilation of information													
Analysis of the provided information at regional level													
Clarifications from the hosting partner													
Organisation of the On-line Staff Workshop													
Review of the On-line Staff Workshop													
3. On-line Staff Workshop in Spain	PP - 4 AVECAL, PP6 - IVACE												
Identification of best-practices on business succession and transfer and compilation of information													
Analysis of the provided information at regional level													
Clarifications from the hosting partner													
Organisation of the On-line Staff Workshop													
Review of the On-line Staff Workshop													
4. On-line Staff Workshop in Lithuania	PP3 - LIC												
Identification of best-practices on business succession and transfer and compilation of information													
Analysis of the provided information at regional level													
Clarifications from the hosting partner													
Organisation of the On-line Staff Workshop													
Review of the On-line Staff Workshop													