

WP.T1_ CONTEXT ANALYSIS

A.T1.2_STAKEHOLDERS

COSULTATION AND INVOLVEMENT

D.T1.2.2 Regional Joint strategy on tackling
technological and managerial skills shortages
of WISEs
SASS

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1. INTRODUCTION

The main aim of the joint strategy is to identify specific priorities and set objectives in this regard - enabling to successfully tackle the technological and managerial shortages of WISEs in each region involved. It provides ideas and procedures of addressing those shortages successfully and promoting WISEs ability to create social innovation in terms of processes, services and products. It offers an integrated approach to tackling with specific priorities and objectives referring to the input provided by each type of stakeholders involved in the project activities. The stakeholders involved in the process included:

WISEs' representatives (social entrepreneurs, top and middle managers, other employees and volunteers)

- Local, regional and national public authorities
- Sectoral agencies
- NGOs and other interest groups
- Higher education and research
- SME representatives
- Business support organisations
- General public

Thus, the Regional Joint Strategy follows the vision of the project aiming to engage in solving common territorial challenges of the regions involved referring especially to the structural weaknesses of social enterprises working with disadvantaged groups (WISEs) e.g. inadequate access to technologies, lack of skills to use such technologies, lack of knowledge of public authorities responsible for development policies.

The Regional Joint strategy crowns all other activities within the WP 1 - Context Analysis Increasing Knowledge on WISEs Skills Shortages in the Central Europe area. Based on the transnational cooperation approach, it offers the assessment of not just problems and shortcomings of the sector in participating regions, but also the ideas of which practices and technologies identified in each region can contribute to the better performances of the WISEs.

This Joint Regional Strategy draws from the full range of findings based both on Research Activities (A.T1.1) and the Stakeholders Consultation and Involvement (A.T1.2), of which it is an integral part. It directly refers to the deliverables:

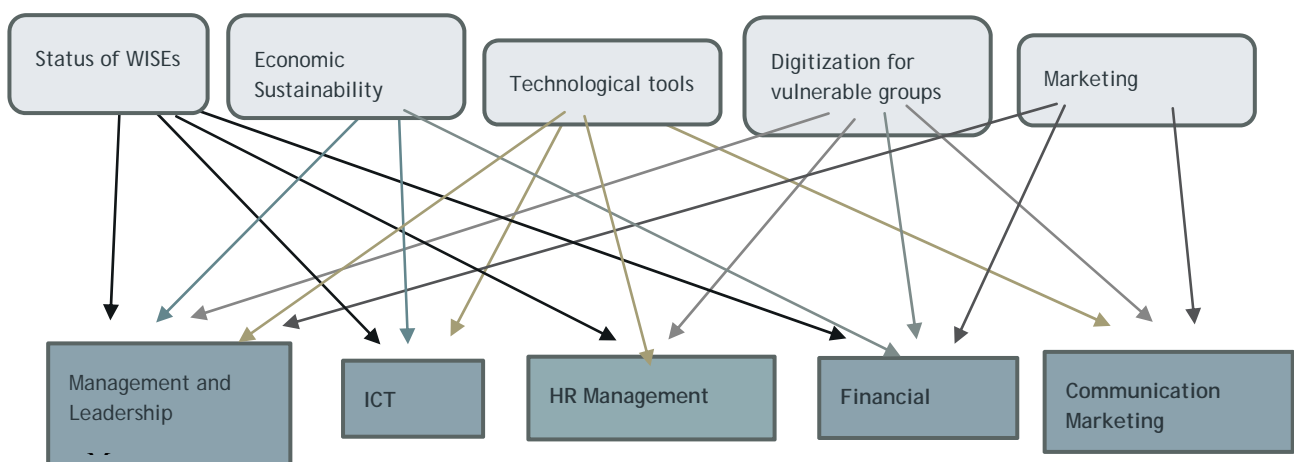
- D.T1.1.2 Report on WISEs technological and skills shortages in the sectors relevant for the project
- D.T1.1.3 Report on innovative technologies, managerial models and practices that could be applied to WISEs
- D.T1.1.4 Regional Reports
- D.T1.1.5 Comparative Analysis
- DT 1.2.1 Report from Stakeholders' Workshops

The outcomes from the stakeholders' workshops are crucial in this regard. Partners presented to stakeholders the results of the first phase of context analysis and research activities (survey and interviews) and discussed on opportunities, resources, needs, competences and tools available for WISEs. The goal was to share the state of the art of WISEs technological competences in the project sectors with the reference of management, marketing and ICT support system. Furthermore, we collected indication on how to build this Strategy.

2. SPECIFICATION OF THE COMMON TECHNOLOGICAL AND MANAGERIAL SHORTAGES WITH THE CORRESPONDING OBJECTIVES

Stakeholder workshops (as reported in the deliverable DT 1.2.1) indicate 5 prevalent topics in all regions: status of WISEs with a cultural aspect and legal framework, economic sustainability, technological tools with emphasis on social needs, digitization for vulnerable groups and marketing. These topics are connected to 5 areas: management & leadership, HR Management, ICT, financial, communication & marketing.

Figure 1: Themes and Areas



To further explore WISEs' digital needs, stakeholders from each region reported on the specific shortages both in term of skills and tools, starting from competences already developed by the partners.

The results are presented in Table 1.

Concerning skills and competences, stakeholders emphasize the implementation of entrepreneurial knowledge with a business background, sales network, performance culture, flexibility, sharing culture, communication skills, financial education, financial and accounting skills, training in public procurement, task manager.

The target is high and medium level (manager); digital competences which soft skills and training, collect data, automation, digital communication and marketing, community building. The target is management, executive employees and vulnerable groups.

Table 1: Trainings on competences/tools already developed by partners

Region	List of trainings on competences/tools already developed by partners	Target addressed
Poland	Wide variety of vocational trainings for WISEs employees (dependent of area of operation)	vocational skills
	Financial monitoring / financial planning, cash-flow	financial management
	Management of WISE / social cooperative / social enterprise / non-profit Ltd (in preparation)	management / leadership
	Information safety / security of personal data (in preparation)	management / legal compliance
	Management of WISE in the area of gastronomy	management
	Organization of work in gastronomy	management
	Use of MoJo (Mobile Journalism) tools (tutorial on preparing professional short movies with a use of cell phones) (in preparation)	marketing, promotion
Italy - Lombardy Region	Training for manager of social enterprise	management/leadership
	Professional requalification for specific sectors	employees/disadvantaged staff
	Social Manager for disadvantaged employees	management
	Mandatory training (safety, reference standard, legislation)	management and employees
Slovenia	Project management tools	All WISEs
	Mapping tool	All WISEs
	e-learning platform	All WISEs
	Farm manager	Agriculture
Croatia	Organisational development	SEs, IE, NPOs
	Business development	SEs, IE, NPOs
	Project management	SEs, IE, NPOs
	Social Impact measurement	SEs, IE, NPOs
Italy - Trentino Region	Focus group implementation	All WISEs

In order to achieve the aim of summarising the essential information, required for the Joint Regional Strategy addressing both the common shortages as well as the specifics of each of the regions involved, the WP leader (SASS) prepared a draft framework for the information needed, which has been debated and commented by all responsible partners. The final version of the document has been sent to responsible project partners from all regions involved, who were asked by the WP leader to list no more than three different strategic priorities in the region and to propose the corresponding objectives.

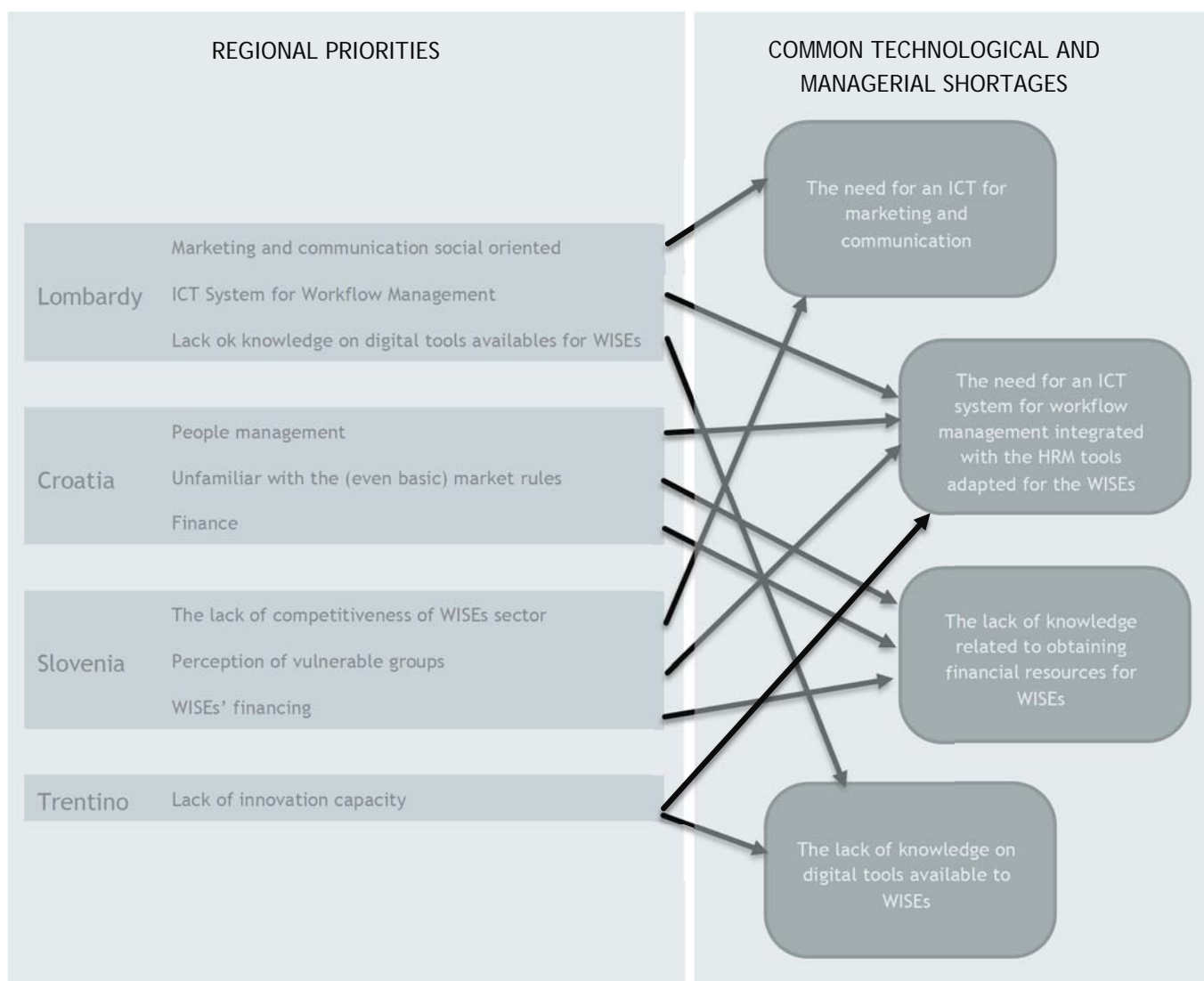
Each region, i.e. Slovenia, Croatia, Lombardy and Trento provided the ranking list of recognised problems and detailed description of the latter. By drawing on information from the context analysis and especially on the stakeholders' inputs within the project activities, all listed partners provided explanation of how each specific need is related to particular functional areas, sectors and types of WISEs. Further, they addressed the issues of competences, cultural issues and attitudes particularly substantiating the needs emphasised. Special focus was on the ICT tools and solutions in terms of trainings referring to the problem.

Based on that, partners developed the main objective ensuing from the identification and description of the specific need. The latter aimed to target target the regional and national policy levels.

The complete results obtained from the partners are presented in Chapter xx of this Regional Joint Strategy and *represent the strategic priorities for each region*.

From these shortages reported for different regions, we are able to specify the *common technological and managerial shortages for all the regions involved*. The links between the regionally specific priorities and the commonly identified technological and managerial shortages are presented in Figure 2. It can be noted that regional priorities converge quite smoothly into a series of common technological and managerial shortages that can then be addressed further through this Strategy and the corresponding activities.

Figure 2: From regional priority problems to common technological and managerial shortages



Based on all the reports, we have also synthesised the shortages with the objectives. By analysing and complementing the regional specifics, we were able to detect overlapping issues and thus to propose the common needs and objectives. In the following chapters we capture these crucial shortages linked to the corresponding common objectives. For each of them, a detailed description is provided and followed by the proposition of further activities that comply the subsequent WP of the project. In order to show the process

of developing the common needs and objectives and to ensure the transparency of the document, the deliverable also contains the regional frameworks (Chapter xxx).

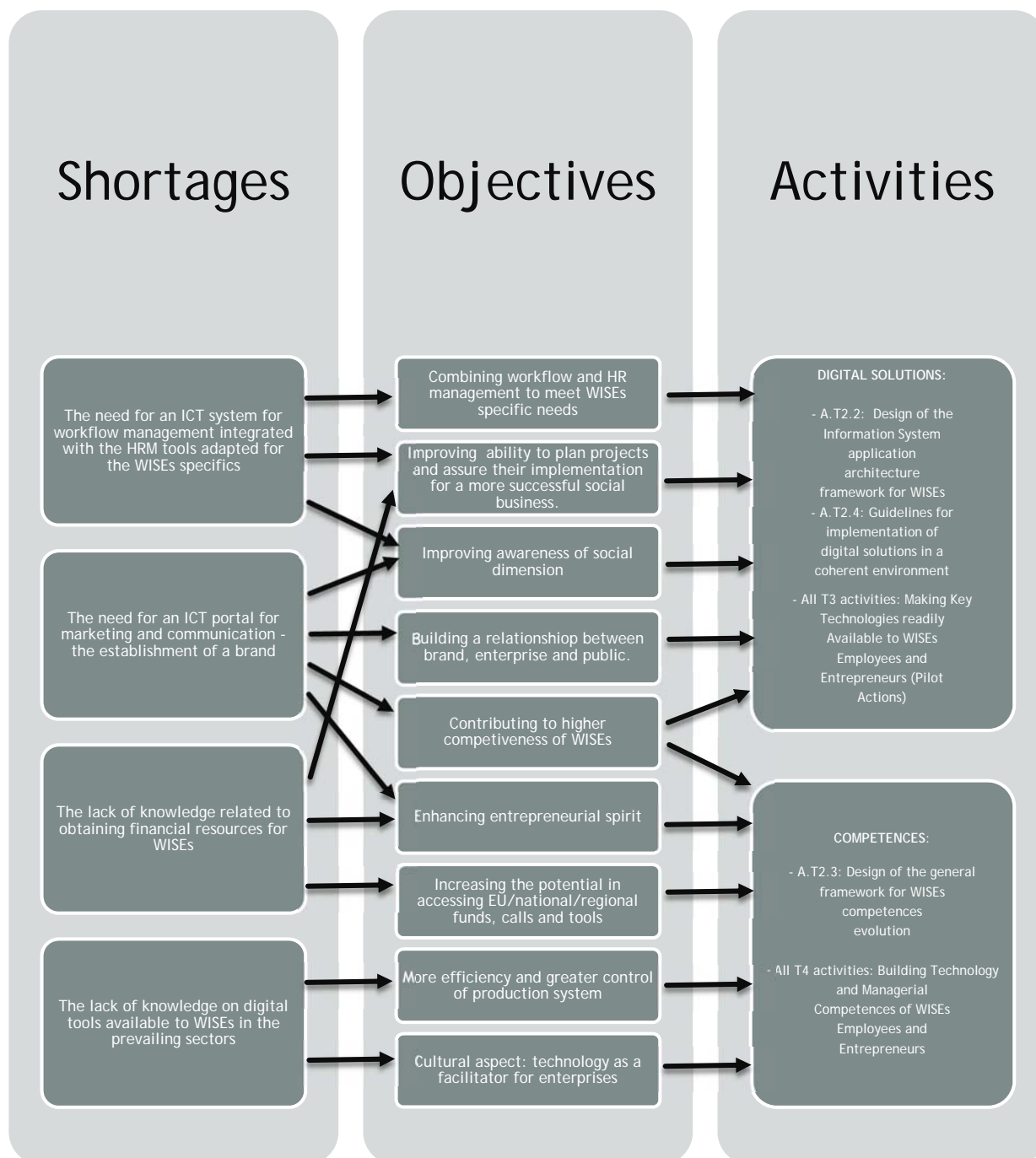
The strategic objectives are linked to shortages in Table 2.

Table 2: Objectives combined with the key technological and managerial shortages they address

Shortages	Corresponding strategic objectives
The need for an ICT system for workflow management integrated with the HRM tools adapted for the WISEs specifics	<ul style="list-style-type: none"> • WISEs ability to plan projects and assure their implementation for a more successful social business. • Combining workflow and HR management to meet WISEs specific needs • Improving awareness of social dimension
The need for an ICT portal for marketing and communication - the establishment of a brand (connecting with external environment and raising the entrepreneurial spirit within particular company)	<ul style="list-style-type: none"> • Building a relationship between brand, enterprise and public. • Contributing to higher competitiveness of WISEs • Enhancing entrepreneurial spirit • Improving awareness of social dimension
The lack of knowledge on digital tools available to WISEs in the prevailing sectors (training/education; tourism; waste management/green area service; agriculture)	<ul style="list-style-type: none"> • More efficiency and greater control of production system • Cultural aspect: technology as a facilitator for enterprises
The lack of knowledge related to obtaining financial resources for WISEs	<ul style="list-style-type: none"> • Increasing the potential in accessing EU/national/regional funds, calls and tools • Enhancing entrepreneurial spirit • Improving abilities to plan projects and assure their implementation for a more successful social business.

It can be noticed that the search for solution for any of the shortages, implies more than one objective. In other words, our response to each shortage would require addressing two or more objectives per shortage. On the other hand, three of the objectives we have been able to specify, respond to two different shortages and are thus even more relevant. This can be noticed for the development of WISEs ability to plan their projects and assure their implementation, to improve the awareness of the social dimension and to enhance entrepreneurial spirit.

Figure 3: Technological and managerial shortages combined with the corresponding objectives, which shall be subsequently addressed through the future INNOWISEs activities



It is also essential to assure that the further activities planned within the INNOWISEs project are able to respond to the objectives, set by this Strategy. Therefore, our objectives, based on the recognised shortages are also directly linked to the further activities on the project.



The overall model connecting the technological and managerial shortages with the corresponding objectives, which are then addressed through the future activities within the project, is presented in Figure 3.

Roughly, we could distinguish between the objectives that are mostly linked to the technological solutions, and the objectives that are mostly linked to the development of WISEs competences, although both may also overlap, while we deal with practical solutions. This overlapping is most obvious for the objective of contribute to higher competitiveness of WISEs, since it most clearly requires the combination of solutions in terms of both training and technologies.

The relevance of training within the further activities in the project derives also quite clearly from the stakeholders' workshops. Concerning skills and competences (which also include some essential attitudes), stakeholders emphasizes the implementation of:

- entrepreneurial knowledge with a business background,
- sales network,
- performance culture,
- flexibility,
- sharing culture,
- communication skills, financial education,
- financial and accounting skills,
- training in public procurement,
- task manager.

The key targets identified for the trainings have been high and medium level (manager); digital competences which soft skills and training, collect data, automation, digital communication and marketing, community building. The target is management, executive employees and vulnerable groups.

In Table 3, we present and summarize how shortages, sectors, competences, trainings and ICT tools are related based on the reports, the findings of the regional partners and generalization from the existing inputs. These connections shall be kept in mind for the future activities, aimed to address the WISEs+ technological and managerial shortages.

Table 3: The linkage between shortages, sectors, competences, trainings and ICT tools

Key shortages	The need for an ICT system for workflow management integrated with the HRM tools adapted for the WISEs specifics	The need for an ICT portal for marketing and communication - the establishment of a brand	The lack of knowledge on digital tools available for WISEs in prevailing sectors	The lack of knowledge related to obtaining financial resources
Sectors	all to the equal extend	all to the equal extend	all to the equal extend	all to the equal extend
The lack of competences	<p>Lack of knowledge and available tools adapted to WISEs specific needs</p> <p>The available ICT tools are not known to WISEs</p> <p>WISEs lack knowledge/skills/competences to use the available ICT tools</p> <p>Existing ICT tools are not accessible to WISE due to high costs or similar reasons</p>	<p>The available ICT tools are not known to WISEs</p> <p>WISEs lack knowledge/skills/competences to use the available ICT tools</p> <p>Lack of innovation capacity</p>	<p>It is important to choose the platform; there is a specific identikit for each client-type</p> <p>Lack of innovation capacity</p>	<p>Communication with financial institutions</p> <p>Lack of knowledge about the available financial tools - appropriate for WISEs project management competences.</p>
Target groups	HR Manager, Financial Manager, Sector Manager	Marketing manager, Communication Manager	High and medium level (manager), other employees, including vulnerable groups	management, financial, accounting and project management staff.
ICT	<p>digital tools that allow an accurate management control and putting together HR management, order management, billing and reporting</p> <p>Management support system tools</p> <p>Communication and collaboration tools</p> <p>Project management</p>	The tool must enable WISEs to present oneself by conveying the social message with advertising and commercial objectives	<p>Information system tools</p> <p>Management support system tools</p> <p>Communication and collaboration tools</p>	<p>Open source:</p> <p>Information platform of various funds, calls and tools for WISEs' start-up financing, WISEs' development, creation of jobs for disadvantaged groups, social incubators development, development of services for WISEs etc.</p>
Training	<p>related to the tools mentioned above, which cover Management and leadership related training, HR management, communication and collaboration and use of ICT in general.</p> <p>related to the competences: lack of skills related to customer relation management, strategic marketing planning, and formation and the implementation of business models.</p>	<p>related to the tool: customer-relations managers, marketing managers</p> <p>related to the competences: lack of skills related to customer relation management, strategic marketing planning, and formation and the implementation of business models: entrepreneurs, top managers, customer-relations managers, marketing managers</p>	Coaching one-to-one because the vulnerable groups may have significant difficulties (physical and psychological)	<p>Skills required to access EU, national and regional funds to obtain project financing.</p> <p>Related to the cultural values, attitudes: raising awareness of the entrepreneurial spirit</p>

	related to the cultural values, attitudes: raising awareness of the entrepreneurial spirit	related to the cultural values, attitudes: raising awareness of the entrepreneurial spirit: entrepreneurs, top managers, customer-relations managers, marketing managers		
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3. DETAILED DESCRIPTION OF THE KEY SHORTAGES AND THE CORRESPONDING STRATEGIC OBJECTIVES

3.1. Integrating workflow management with the HRM tools adapted for the WISEs specifics

In the strategy, the issues of workflow management and human resources management, specific to WISEs are explicitly or implicitly recognized in Lombardy, Croatia, Slovenia and Trentino. The problems recognized could be combined into a general shortage: on the one hand, WISEs typically lack proper workflow management systems with an efficient ICT support – on the other hand, these processes should be adapted to the special requirements of the deprived groups, employed by the WISEs. Their specific challenges call for an *innovative integration between managing the work flows and managing people with their particular needs*.

Lombardy WISEs needs a digital system for workflow management that optimize the management, billing and reporting. The ICT system must to be economically sustainable. It applies to all functional areas listed, i.e. management and leadership; financial; marketing; ICT (in general). All sector would benefit from the solution of this problem to the equal extend

In Slovenia, partners reported that comparing to other SMEs, the WISEs sector is not competitive enough on the market due to the lack of entrepreneurial spirit, knowhow and competencies for creating viable social purpose business models, strategic marketing planning, and customer relation management. The problem is in the lack of tools that can be used, and the lack of knowledge to apply such tools.

Further, both Slovenians and Croatians stated that working process should be performed with a consideration of the HRM. Specific needs of the vulnerable groups have to be taken into account, while planning the projects and workflows. Significant energy seems to be put into adjusting work processes for employees with particular needs, which results in improvements across the board, as evidenced by participants in the stakeholders' meeting. Although evidence of efficiency in social enterprises is available and valid, managers focus on a lack of trust towards employees with special needs and the need to oversee them. Awareness of vulnerable groups and their capabilities is lacking.

In Croatia, all human-related challenges are emphasized (sometimes even multiplied) in the management of people with disabilities (physical and / or mental); from mentoring where one has to customize teaching approach, motivation tools (one size does not fit all), managing diversity, evaluation process has to be more personalized which can lead to dissatisfaction of others.

Widespread awareness campaigns are the most likely to result in improvements over the long and short term. This is based on a significant body of work performed over the past decades. Destigmatization research shows that awareness campaigns and other forms of reducing stigma work with varying degrees of reliability but produce statistically significant results.

WISEs also needs knowledge and information regarding potential partners for joint projects, and tools for colaboration within the projects. There is also a lack of networking within WISEs' sector and networking among WISEs towards business and public sector.



In Trento, partners reported that there is a lack of innovation capacity, as WISEs in Trentino region have been sustained by public spending and privileged relationship for a longer time than the rest of Italy. There is the need of more data gathering at the source, in order to help WISEs to see trends in performances and needs and shape together future policies.

Regarding the particular type of WISEs, especially small and medium WISEs, with a number of employees between 10 and 30 would benefit. They have less resources (training possibilities and economic resources) in comparison to bigger WISEs having more possibilities. Due to the limited number of employees they do not cope successfully with market demands and networking.

In small and micro companies, only a few individuals are in charge of many different processes and thus they require knowledge from many different fields: law, financial-accounting, specific legislation, HRM, public procurement, marketing, logistic, sales. However, this refers to all to some extent. Therefore, the solution would be useful for other WISEs.

In all regions, there is the lack of ICT related skills and digital illiteracy in general. The problem involves the lack of competence(s)/knowledge referring especially to technological knowledge and ICT use. The important issue is also the lack of knowledge of the capabilities and risks associated with particular vulnerable groups.

There is also tradition of the vertical hierarchical decision-making process. In Italy, the problem involves their short-term vision, which is dictated by constant threats to their survivals (strong competition, lack of resources and knowledge, barriers to credit, lower productivity, higher labour costs).

There are some tools applied in relation to the workflow management and HRM, but there are not sufficient. There are some HR management tools, but neither can solve the specific problems related to this issue. The solutions could be a selection or combination from the following options:

- To use the existing software tools in a proper combination,
- To consider the adapt some of the existing software tools in order to combine workflow and human resources management adapted for the WISEs needs,
- To develop new software tools for this specific purpose.

These solutions will have to be considered during the next stages of the project implementation, particularly within Workpackage 2.

The types of tools that can be considered as potentially be relevant while looking for the solution to this problem we may mention:

- What is needed are digital tools that allows an accurate management control and putting together HR management, order management, billing and reporting
- **Information system tools:** general tools that are representing the baseline and ensuring conditions for creation, collection, manipulation and sharing of digital information, such as office tools and document editing, e-mail tools, communication tools and other baseline IT software.
- **Management support system tools:** tools that are helping organisations with management of all kind of processes that have effect on the preparation, execution and evaluation of projects, collaboration and interaction with clients and/or stakeholders on projects, management of human resources, promotional tools and other management related tools.
- **Communication and collaboration tools:** tools that are helping organizations in efficient internal and external communication

More specifically, the examples of those tools are:



- **LibreOffice:** LibreOffice is open source package of office software, developed by The Document Foundation that offers programs for creation and editing of different kind of documents such as text (Writer), slideshows (Impress), spreadsheets (Calc), drawings (Draw), diagrams (Math) and databases (Base). It is available for download and install on Linux, Windows, macOS, FreeBSD, NetBSD and Android operation systems.
- **Trello:** Trello is an online tool that helps teams collaborate and manage work and projects. It organizes projects into the boards and manages what is being worked on, who is working on what and where is it something in the process. In addition to that, it also allows management of documents and attachments, creating lists and notifications. Tool is completely web based with possibility to access the boards from mobile and tablet devices.
- **Basecamp:** Basecamp is project management and team communication software that helps teams stay on the same page. Being not so much a traditional project management tasks (e.g., resource planning and long-term scheduling) it offers to-do-lists, calendaring, due dates and file-sharing. Its goal is to provide teams a way to keep track of priorities and actionable items. It is web-based tool accessible from all devices.
- **Bitrix24:** Bitrix24 is collaboration and social intranet platform for businesses, offering wide range of tools for project management, team & client collaboration, document sharing and management, clients' management, HR management, communication tools (both text and video) and their management supporting tools. It is web-based application that can also be used on-premise for enterprises.
- **Zoho:** Zoho is an online office suite and set of tools for document processing, database management, web conferencing and communication, CRM (customer relationship management), project and task management, invoicing, e-mail, social media management, human resource management, reporting and other business and management supporting tools. It is offered as an online tool with the possibility to install separate modules as the plugin in the Microsoft Word, Excel or other relevant complementary software. It also offers integration with 3rd party services such as Dropbox for document sharing, Slack for communication and GitHub for code repository.
- **Breezy HR:** Breezy HR is end-to-end recruiting software designed to optimize the recruiting process bringing the resources on board in less time (and with less hassle) in a user friendly way. The process of hiring is supported through functionalities like candidate management, advertising of jobs, candidate sourcing, career portals, email & scheduling, team collaboration and reporting.
- **Odoo:** Odoo (formerly OpenERP) is an integrated set of applications that offer modules for project management, billing, accounting, inventory management, manufacturing, and purchasing. Modules are integrated with each other and can exchange all kinds of necessary information. In opposite to bigger ERP system, Odoo makes it all friendlier with a simple and clean user interface. The interface is reminiscent of Google Drive, with just the functions you need visible. It is offered as a web-based tool or as an installed software solution.

Perception of vulnerable groups could be changed by using general tools for social communication such as Facebook and others, through which this problem could be communicated. Any online media, social network or other widespread communications package.

Target group that would use these tools are HR Manager, Financial Manager, Sector Manager.

Obviously, the WISEs representatives would prefer open source software.

Training(s), which will be needed in relation to these tools shall be adopted to the decision whether we suggest working with the combination of the existing tools, their possible adaptations and/or developing new solutions.



In this context, the following observations noted up to now concerning the training implementation will have to be considered:

- Trainings related to the tools mentioned above would be required, which cover management and leadership related training, HR management, communication and collaboration and use of ICT in general.
- Training for using specific tools should be focused on getting general ICT skills and expertise, which are applicable horizontally, with any kind of specific tool, since the tools are more or less easy to use and user friendly. The duration of the training is estimated to last once per week two hours in five weeks - cca. 10 hours. In principle, however, the duration of training that target groups would need. As long as possible, as consistently as possible
- In the field of managerial competences, we should consider addressing the lack of skills related to customer relation management, strategic marketing planning, and formation and the implementation of business models; the training should involve: top managers, customer-relations managers, marketing managers
- Appropriate references and true capabilities and risks involved with employing vulnerable groups should be a special topic for the training.
- Training should also involve general public, vulnerable group itself. Regarding the latter, some specifics have to be taken into account. For example, vulnerable groups represent almost 50% of the employees of the social cooperatives. Coaching one to one is the way to overcome physical and psychological difficulties.

3.2. An ICT portal for marketing and communication

Concerning marketing, stakeholders agree that there is a substantial lack of marketing and communication tools, adapted to the social goals of the WISEs. The marketing tools used are general and therefore not very incisive.

In the Slovenian stakeholders' workshop, the final theme "marketing" was briefly mentioned, but did not fall below the cut-off rate. There seemed to be a consensus among participants that no additional steps were required in regard to marketing. However, the results from the interviews and the survey identify marketing as one of the crucial shortages. Many survey respondents mentioned a deficit regarding e-commerce tools.

Marketing was one of the most frequent themes at stakeholders meeting in Croatia. It is also worth mentioning how it is not an isolated or separated subject, but a cross-nodes theme which came out under many other general points: social cooperatives, education, SE Business etc. The survey for Croatia also indicated e-commerce tools, collaboration tools and other marketing support tools are the most needed.

In Lombardy, marketing actions to support services are carried out sporadically, without a prior market analysis nor a subsequent formalized marketing plan. WISEs have emphasised the need to have partners that can guarantee a more effective and efficient distribution of products and the need to find commercial links with local businesses. Concerning marketing technology and tools, WISEs in Lombardy use ICT platforms in marketing for communication (46.5%), promotion (46.5%) and customer care (55.8%). The attention is focused on "marketing dedicated to social fields". Although WISEs in Lombardy have been improving their way of using marketing and promotional tools in the recent years, a lot of job has still to be done in order to be more competitive on the market. Compared to other SMEs, WISEs are bringing particular attention to social aspects that need to be told. It is important to go beyond the fact of working with a social aim. It is necessary to invent a marketing language (i.e.: storytelling) that enhances social goals.

In Trentino, digital communication (both internal and external), marketing and online presence are perceived as one of the greatest shortcomings. Marketing tools are not very well known. E-mail is the main



channel to communicate with customers and their network and e-commerce is completely underdeveloped. One of the greatest shortcomings outlined by surveys, interviews and group discussion regards digital communication (both internal and external), marketing and online presence.

In Trentino Alto Adige Region, in fact, it is very difficult to find WISEs online; they do not have a website or, the online websites are very old; they are not on social media and do not sell their products online. Even if they manage a broad portfolio of clients, they hardly use CRM platforms and if they keep track of calls, meetings and proposals, they do that by manually updating an Excel Sheet. Same goes for team work and work flow tools: emails, pins, phone calls and Whatsapp groups are their main channels (99.9%).

Besides a general lack of knowledge around digital tools, there is a lack of competences and expertise about how to use them.

This gap affects a broad spectrum of areas that are crucial to economic growth and survival on the market:

- By not telling stories about what they do, they hardly manage to build brand awareness and reputation outside their territory and their network, thus not reaching potential new customers, volunteers, donors and other stakeholders. Community building starts with storytelling. Moreover, a strong community also means more institutional legitimization in local areas and more influence on policies;
- By not selling their products/services online, they lose many potential private customers. This is true both for B2B and B2C activities. A lot of WISEs rely on few big customers that account for a big slice of total revenues. Reaching many smaller customers can mitigate the risk of losing the bigger ones, and helps explore new market opportunities;
- By not using CRM platforms they lose much time and have poorer performances in terms of alignment and efficiency, and they cannot collect precious data that can help them see the big picture of what they are doing more clearly;
- By not using team communication tools, they lose a lot of time and effort to be aligned both within their team and with other partners. This makes the creation and maintenance of networks as well as project management more time consuming and less efficient.

In the Polish stakeholders' workshops, participants of the meeting also pointed out poor communication with stakeholders and that the promotion of social enterprises is not effective. This particularly applies to public relation activities, such as branding and others. The use of social media in marketing activities is definitely insufficient, which results from the rather popular lack of knowledge about modern marketing and tools (including ICT) that can be used in this area.

WISEs sector is not competitive enough on the market due to the lack of strategic marketing planning, customer relation management, usage of ICT marketing tools etc. The problem is in the lack of tools that can be used, and the lack of knowledge to apply such tools. WISEs are typically using Skype, FB, Twitter for communication internally and externally. Only some of them, however, use somewhat more specific tools, such as Adwords and WoCommerce.

From the existing marketing tools that can be applied, we can mention:

- Odoo (formerly OpenERP) is an integrated set of applications that offer modules for project management, billing, accounting, inventory management, manufacturing, and purchasing
- Google Analytics is free tool provided by Google, that tracks and reports web traffic.
- Wix is all-in-one online website builder, using which users can define, create and publish websites for free.

There is also a lack of networking within WISEs' sector and networking among WISEs towards business and public sector. The problem is referring to the lack of marketing tools, lack of skills related to customer relation management, strategic marketing planning, and formation and the implementation of business models.



The lack of marketing skills and tools is often linked to a broader issue of the lack of entrepreneurial spirit. The problem also involves cultural issues. In Slovenia and Croatia for instance, in all managerial groups, one can find a lack of entrepreneurial spirit, having roots in the history of the heavy reliance on the state. In Slovenia, the lack of entrepreneurial spirit is most common in employment centres due to their specific status supported by the state.

What is important, is also an issue of stigma encompassing cultural issues, attitudes, values and other aspects of personality and society. Attitudes and especially values are difficult to change, but the perception of what is acceptable behaviour in public can shift rapidly. Awareness campaigns targeted at employers, management and HR representatives would produce a noticeable effect.

A plausible response to these issues can be an *ICT portal for marketing and communication*. Its purpose would be both the establishment of a brand (connecting with external environment) and simultaneously raising the entrepreneurial spirit within an individual company (connecting its internal stakeholders). The tool must enable the WISEs to present oneself by conveying the social message with advertising and commercial objectives. It should also enable to create a brand, which would raise the entrepreneurial spirit and enhance the innovation capacities.

In the partners' responses used for this strategy, the problem has been recognized in Lombardy, by the Slovenian partners and by Croatian partners.

The problem applies to management and leadership, HR management, other employees, disadvantaged staff. It refers to all sectors to the equal extent. Small and micro size WISEs would benefit from the solution the most. Due to the limited number of employees they do not cope successfully with market demands and networking. Thus, especially the WISEs with a number of employees between 10 and 30 would benefit. They have less resources (training possibilities and economic resources) in comparison to bigger WISEs having more possibilities.

To solve the problem, it is important to choose the platform; there is a specific identikit for each client-type.

Topic of the training: peer-learning communities, explore new ways to transfer knowledge and innovate the way umbrella organizations deliver formation to WISEs professionals. Gamification is one of the ways to be considered.

The target groups for the training are especially marketing managers and communication managers.

3.3. The lack of knowledge on digital tools available for WISEs

The lack of *knowledge on digital tools available for WISEs* is a problem in all prevailing sectors, i.e. training/education; tourism; waste management/green area service; agriculture.

This is a general problem, which one can observe in all regions. WISEs typically use Office tools, internet, e-mail and telephone that are very common tools but not specific for an enterprise. In some situations they lack skills but often the WISEs are not even aware, which technologies are available.

The results of stakeholders' meetings from all regions indicate:

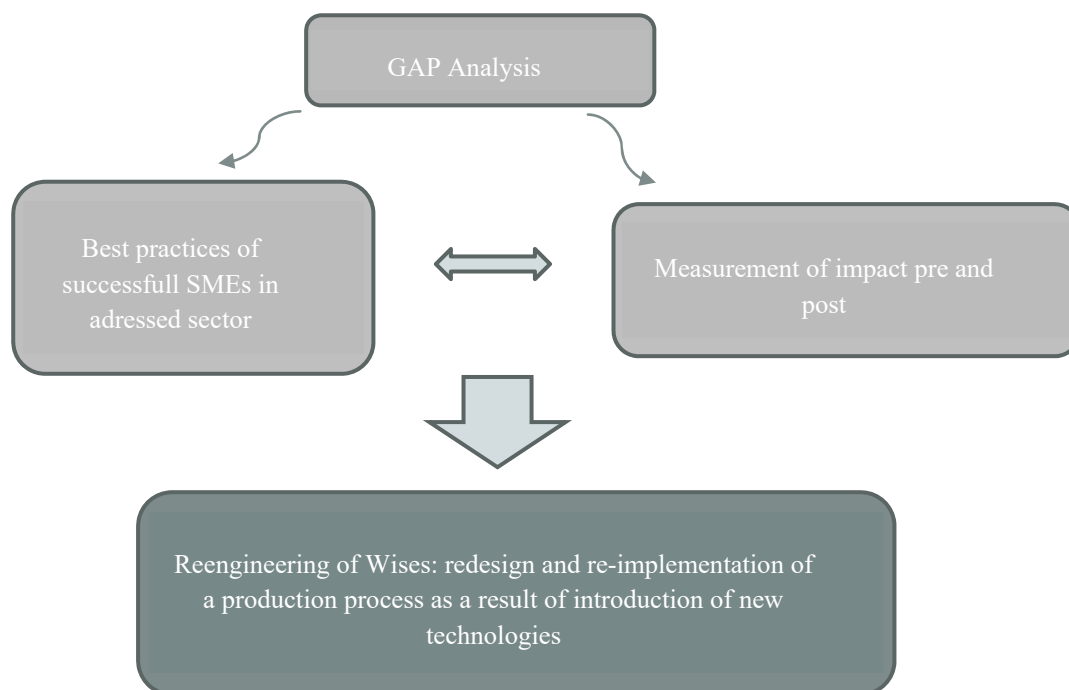
- The actions should aim to increase digital skills in high and medium level in order to increase general knowledge and, subsequently, to transfer digital skills and technological tools also to disadvantaged staff. The actions set out in the strategy should contribute to reducing all risks associated with the difficulties related to the cultural aspects.
- There is a need of Gap Analysis, to understand what needs the technology could fill. Gap analysis involves determining, documenting, and improving the difference between business requirements and current capabilities. Also, there is a need to identify a tool that enables to measure, in pre and post, the technological impact on organization.

- Gap Analysis and the measurement of the technological impact work on reengineering of WISEs, through the use of management systems of successful SMEs in addressed sector.

The process is presented in Figure 4.

The actions described are intended to work across the areas of WISEs organization and at different levels. Monitoring of such actions will be essential over the coming years.

Figure 4: A process based on GAP analysis



The problem applies to management and leadership, HR management and other employees, including the disadvantaged staff. It refers to all sectors to the equal extend. Small and micro size WISEs would benefit from the solution the most. Due to the limited number of employees they do not cope successfully with market demands and networking.

There are also cultural issues referring to the problem, as in the many WISEs in leadership positions there are people “over 45 years” with a cultural effort to adapt to new technology (“digital illiteracy”). It is the duty of leadership and management to acquire skills and tools to be then transferred to the other categories (employees, vulnerable groups) present in WISEs. The problem can also be in the lack of innovative capacities and in the lack of entrepreneurial spirit enhancing the someone’s adaptation to new technologies.

When trainings relate to vulnerable groups, they should be in terms of coaching one-to-one because the vulnerable groups are facing very important difficulties (physical and psychological).

In general, MOOC based training can be applied. It can deal with the available tools for

- project management,
- workflow management
- financial management,
- communication,



- marketing and
- e-commerce.

Tools and solutions that are targeting specific sector, such as agriculture, tourism or waste management for example, can also be addressed. They include, for example, Farm Management (agriculture), eVineyard (agriculture) and WasteBits (waste management). These tools, unlike the tools in other use areas, are not applicable for all kind of businesses and are vertically oriented.

Training for using specific tools should be focused on getting general ICT skills and expertise, which are applicable horizontally, with ena kind of specific tool, since the tools are more or less easy to use and user friendly. The duration of the training is estimated to last once per week two hours in five weeks – cca. 10 hours. In principle, however, the duration of training that target groups would need. As long as possible, as consistently as possible

Tagret groups that would benefit from using those tools are high and medium level (manager) in all sector of enterprise.

3.4. The lack of knowledge on obtaining financial resources

The WISEs problem of *obtaining financial resources* is raised by Slovenian and Croatian partners.

WISEs faces the lack of financial resources at different stages of their business development. Financial resources are needed especially for employing qualified staff, development of products/services, investment in equipment and ICT supporting tools and for the implementation of marketing and sales activities. Identification of a set of financing options and provision of supporting services could help WISEs in overcoming their financial problems and plan their business in advance. There is a lack of finance, especially for engaging experts and other qualified staff who can help WISEs in their business development or development of their products/services.

The problem refers to the financial area and it pertains equally to all sectors. The financial solutions should address all type of WISEs. However, different type of financial solutions should be developed and implemented based on different financial needs of WISEs and of their development stages (development of product/services, start-up, growth, expansion, maturity).

The problem involves the lack of the following competences/knowledge:

- financial and accounting competences
- competences for communication with financial institutions
- lack of knowledge about the available financial tools
- lack of knowledge about which financial tools are appropriate for WISEs
- project management competences (particularly in relation to managing projects obtained from the EU, national, regional and local sources).

Target groups that would benefit the most when improving the competences are of management, financial, accounting and project management staff.

The problem also involves cultural issues. The problem involves the lack of **entrepreneurial spirit** and the attitude that WISEs should not run their business with the aim of creating profit. WISEs should be oriented to profit creation but with the aim of reinvesting the profit in WISEs development. The social attitude is usually predominant, whereas the business attitude is vey low. There is a lack of entrepreneurial skills and



experience. WISEs are still predominately established by non-profit organizations or public institutions, thus people on managerial level still don't have business orientated minds.

In the context of this problem (acquiring and managing funding for WISEs), the ICT tools are not very common to be used. Acquiring financing requires rather standard way of handling this problem (searching for information, meetings, contracting, ...), which does not involve ICT tools directly. However, in the context of financial control and implementation there are some ICT tools that could be used in order to mitigate the risk of overspending and introducing the project management principles and tools in order to increase control over financial spending. These tools could be following:

- Platforms and e-services which are providing the Information about EU/national/regional funds and cooperation platforms.
- **Management support system tools (especially Project management tools):** tools that are helping organisations with management of all kind of processes that have effect on the preparation, execution and evaluation of projects, collaboration and interaction with clients and/or stakeholders on projects, management of human resources, promotional tools and other management related tools.
- Financial business planning and evaluation

Moreover, an *information platform* of EU/national/regional funds, calls and tools for WISEs' start-up financing, WISEs' development, creation of jobs for disadvantaged groups, social incubators development, development of services for WISEs etc. can be useful in this regard.

Open source software solutions are, of course, preferable.

Based on these assumptions, there are some examples of the existing ICT tools that could be used:

- **Trello:** Trello is an online tool that helps teams collaborate and manage work and projects. It organizes projects into the boards and manages what is being worked on, who is working on what and where is it something in the process. In addition to that, it also allows management of documents and attachments, creating lists and notifications. Tool is completely web based with possibility to access the boards from mobile and tablet devices
- **Podio:** Podio is a cloud-based collaboration service that was founded in 2009 and acquired by Citrix in 2012. Podio is an extremely flexible and highly customizable online hub for work and communication that is user friendly and scales easily for growing businesses. Podio supplies a web-based platform for organizing team communication, business processes, data and content in project management workspaces. Users can also select business "apps" from an online app store or build their own according to project needs
- **Bitrix24:** Bitrix24 is collaboration and social intranet platform for businesses, offering wide range of tools for project management, team & client collaboration, document sharing and management, clients management, HR management, communication tools (both text and video) and other management supporting tools. It is web-based application that can also be used on-premise for enterprises.
- **Zoho:** Zoho is a online office suite and set of tools for document processing, database management, web conferencing and communication, CRM (customer relationship management), project and task management, invoicing, e-mail, social media management, human resource management, reporting and other business and management supporting tools. It is offered as a online tool with the possibility to install separate modules as the plugin in the Microsoft Word, Excel or other relevant complementary software. It also offers integration with 3rd party services such as Dropbox for document sharing, Slack for communication and Github for code repository.
- **Odoo:** Odoo (formerly OpenERP) is an integrated set of applications that offer modules for project management, billing, accounting, inventory management, manufacturing, and purchasing. Modules are



integrated with each other and can exchange all kinds of necessary information. In opposite to bigger ERP system, Odoo is makes it all friendlier with a simple and clean user interface. The interface is reminiscent of Google Drive, with just the functions you need visible. It is offered as a web-based tool or as an installed software solution.

- ERPNext: ERPNext is an open source project and is ERP (Enterprise Resource Planning) software. It was designed to scratch a particular itch, in this case replacing a creaky and expensive proprietary ERP implementation. It is applicable for small and medium-sized businesses in different industries such as Services, Manufacturing, Retail, Distribution and Schools. It includes modules for accounting, asset management, CRM, HRM, sales, purchase, warehouse management, and project management. It can be used as a public hosted application or downloaded and installed on the private infrastructure.

Target group that would use these tools are management, financial, accounting and project management staff.

Due to the multi-dimensionality of the topic, the training can be:

- related to entrepreneurial spirit
- related to the competences: lack of financial, accounting and project management skills,
- related to the ICT tools

As far as the problem is related to cultural values and attitudes, training may be considered for raising awareness of the entrepreneurial spirit. Typical target groups would be WISEs entrepreneurs, top managers, customer-relations managers and marketing managers. Trainings for acquiring competences and gaining entrepreneurial spirit should last cca once per week four hours in five weeks – cca 20 hours.

Regarding the training related to the ICT tools, training for using specific tools should be focused on getting general ICT skills and expertise, which are applicable horizontally, with any kind of specific tool, since the tools are more or less easy to use and user friendly. The duration of the training is estimated for about two hours per week in five weeks – cca. 10 hours.

For all types, forms, styles of implementation - training in small groups and in combination with consulting is advisable.

Target groups for the training would be especially management, financial, accounting and project management staff.

4. ADDRESSING THE SHORTAGES AND IMPLEMENTING OBJECTIVES THROUGH THE FUTURE INNOWISES ACTIVITIES

In Figure xx, we have briefly presented the links between the shortages, the objectives and the activities with the INNOWISEs project.

Table 4: Addressing the key shortages identified in the Strategy through the project activities

Key shortages		The need for an ICT system for workflow management integrated with the HRM tools adapted for the WISEs specifics	The need for an ICT portal for marketing and communication - the establishment of a brand	The lack of knowledge on digital tools available for WISEs in prevailing sectors	The lack of knowledge related to obtaining financial resources
Activities					
A.T2.1	Design of the general framework for WISEs processes and service empowerment	+	+	+	+
A.T2.2	Design of the Information System application architecture framework for WISEs	+	+		
A.T2.3	Design of the general framework for WISEs competences evolution			+	+
A.T2.4	Guidelines for implementation of digital solutions in a coherent environment	+	+	+	+
A.T3.1	Pilot Actions Start-up Activities and Methodology	+	+		
A.T3.2	Pilot Actions Implementation	+	+	+	
A.T3.3	Transferring activities of Pilot Actions	+	+	+	



A.T3.4	Pilot Actions Evaluation	+	+		
A.T4.1	Training Start-up Actions and methodology	+	+	+	+
A.T4.2	Elaboration of training modules	+	+	+	+
A.T4.3	Training implementation	+	+	+	+
A.T4.4	Evaluation of training activities	+	+	+	+
A.T4.5	Finalisation of MOOC modules on the project Technological Platform	+	+	+	+

Table 5: Implementing the key objectives identified in the Strategy through the project activities

Activities	Objectives	Combining workflow and HR management to meet WISEs specific needs	Improving ability to plan projects and assure their implementation for a more successful social business.	Improving awareness of social dimension	Building a relationship between brand, enterprise and public.	Contributing to higher competitiveness of WISEs	Enhancing entrepreneurial spirit	Increasing the potential in accessing EU/national/regional funds, calls and tools	More efficiency and greater control of production system	Cultural aspect: technology as a facilitator for enterprises
A.T2.1	Design of the general framework for WISEs processes and service empowerment	+	+	+	+	+				
A.T2.2	Design of the Information System application architecture framework for WISEs	+	+	+	+	+				
A.T2.3	Design of the general					+	+	+	+	+



	framework for WISEs competences evolution									
A.T2.4	Guidelines for implementation of digital solutions in a coherent environment	+	+	+	+	+	+	+	+	+
A.T3.1	Pilot Actions Start-up Activities and Methodology	+	+	+	+	+				
A.T3.2	Pilot Actions Implementation	+	+	+	+	+	+	+	+	+
A.T3.3	Transferring activities of Pilot Actions	+	+	+	+	+				
A.T3.4	Pilot Actions Evaluation	+	+	+	+	+				
A.T4.1	Training Start-up Actions and methodology					+	+	+	+	+
A.T4.2	Elaboration of training modules					+	+	+	+	+
A.T4.3	Training implementation					+	+	+	+	+
A.T4.4	Evaluation of training activities					+	+	+	+	+
A.T4.5	Finalisation of MOOC modules on the project	+	+	+	+	+	+	+	+	+



	Technological Platform									
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A more detailed overview, how the future activities in the project relate to the shortages identified is presented in Table 4. In Table 5, we present, which of the future project activities are intended to contribute to the implementation of the particular objectives, defined through this strategy.

In the final chapter that follows, we specify in a systematic way the basic technological and managerial shortages, their descriptions and challenges, as well as the objectives through which these shortages can be addressed and reduced.

5. REGIONAL SPECIFICS: OVERVIEW OF THE PRIORITIES FOR EACH REGION

5.1. Slovenia

Specify at least one and up to three most significant needs/problems of WISEs in your region and suggest corresponding objectives for each of them that can be achieved within the INNOWISE project.

The 1 st highest-ranking priority of WISEs	
Specify the need/problem	The lack of competitiveness of WISEs sector
Explain the problem	Comparing to other SMEs, the WISEs sector is not competitive enough on the market due to the lack of entrepreneurial spirit, knowhow and competencies for creating viable social purpose business models, strategic marketing planning, customer relation management, usage of ICT marketing tools etc. The problem is in the lack of tools that can be used, and the lack of knowledge to apply such tools; specific needs of the vulnerable groups have to be taken into account, while planning the projects and workflows; they need also knowledge and information regarding potential partners for joint projects, and tools for collaboration within the projects. There is also a lack of networking within WISEs' sector and networking among WISEs towards business and public sector.
To which functional area(s) is the problem related (delete all that does not apply)	Management and leadership HR management Marketing ICT (in general)
In which sectors the WISEs would particularly benefit from the solutions of this problem?	all to the equal extend
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	Small and micro size WISEs would benefit from the solution the most. Due to the limited number of employees they do not cope successfully with market demands and networking. In Slovenia, the lack of entrepreneurial spirit is most common in Employment centres due to their specific status supported by the state. In small and micro companies, only a few individuals are in charge of many different processes and thus they require knowledge from many different fields: law, financial-accounting, specific legislation, HRM, public procurement, marketing, logistic, sales



	However, this refers to all to some extend. Therefore, the solution would be usefull for other WISEs.
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	Yes. The lack of ICT related skills and digital illiteracy in general, but especially referring to marketing tools, lack of skills related to customer relation management, strategic marketing planning, and formation and the implementation of business models.
The competences of which target group precisely need to be improved in this regard? Specify the target group, i.e. managerial/operative level; vulnerable groups	Managerial level: especially entrepreneurs, top managers, customer-relations managers, marketing managers
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	Yes. In all managerial groups, one can find a lack of entrepreneurial spirit, having roots in the history of the heavy reliance on the state. There is also tradition of the vertical hierarchical decision making process.
Are existing ICT tools applied in relation to this problem?	Not sufficient, WISEs are using: Adwords (not all WISEs) , skype, FB, Twitter, WoCommerce (not all WISEs)
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	The available ICT tools are not known to WISEs WISEs lack knowledge/skills/competences to use the available ICT tools Existing ICT tools are not accessible to WISE due to high costs or similar reasons (they would like to have ADOBE FILE CREATOR, Outlook PRO)
Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> ■ In the context of need assessment, the following tools should be used by the WISEs: ■ Information system tools: general tools that are representing the baseline and ensuring conditions for creation, collection, manipulation and sharing of digital information, such as office tools and document editing, e-mail tools, communication tools and other baseline IT software. ■ Management support system tools: tools that are helping organisations with management of all kind of processes that have effect on the preparation, execution and evaluation of projects, collaboration and interaction with clients and/or stakeholders on projects, management of human resources, promotional tools and other management related tools. ■ Communication and collaboration tools: tools that are heloing organizations in efficient internal and external communication
Clarify if target groups prefer Open Source or are wiling to buy those tools / what funds are available in that regard	They would prefer open source
Briefly describe these tools and their key functions	<p>Tools that would potentially be used are following:</p> <ul style="list-style-type: none"> ■ LibreOffice: LibreOffice is open source package of office software, developed by The Document Foundation that offers programs for creation and editing of different kind of documents such as text (Writer), slideshows (Impress), spreadsheets (Calc), drawings (Draw), diagrams (Math) and databases (Base). It is available for download and install on Linux, Windows, macOS, FreeBSD, NetBSD and Android operation systems. ■ Trello: Trello is an online tool that helps teams collaborate and manage work and projects. It organizes projects into the boards and manages what is being woked on, who is working on what and where is it something in the process. In addition to that, it also allows management of documents and attachments, creating lists and notifications. Tool is completely web based with possibility to access the boards from mobile and tablet devices. ■ Basecamp: Basecamp is project management and team communication software that helps teams stay on the same page. Being not so much a



	<p>traditional project management tasks (e.g., resource planning and long-term scheduling) it offers to-do-lists, calendaring, due dates and file-sharing. Its goal is to provide teams a way to keep track of priorities and actionable items. It is web-based tool accessible from all devices.</p> <ul style="list-style-type: none"> ■ Bitrix24: Bitrix24 is collaboration and social intranet platform for businesses, offering wide range of tools for project management, team & client collaboration, document sharing and management, clients management, HR management, communication tools (both text and video) and their management supporting tools. It is web-based application that can also be used on-premise for enterprises. ■ Zoho: Zoho is a online office suite and set of tools for document processing, database management, web conferencing and communication, CRM (customer relationship management), project and task management, invoicing, e-mail, social media management, human resource management, reporting and other business and management supporting tools. It is offered as a online tool with the possibility to install separate modules as the plugin in the Microsoft Word, Excel or other relevant complementary software. It also offers integration with 3rd party services such as Dropbox for document sharing, Slack for communication and Github for code repository. ■ Breezy HR: Breezy HR is end-to-end recruiting software designed to optimize the recruiting process bringing the resources on board in less time (and with less hassle) in a user friendly way. The process of hiring is supported through functionalities like candidate management, advertising of jobs, candidate sourcing, career portals, email & scheduling, team collaboration and reporting. ■ Odoo: Odoo (formerly OpenERP) is an integrated set of applications that offer modules for project management, billing, accounting, inventory management, manufacturing, and purchasing. Modules are integrated with each other and can exchange all kinds of necessary information. In opposite to bigger ERP system, Odoo is makes it all friendlier with a simple and clean user interface. The interface is reminiscent of Google Drive, with just the functions you need visible. It is offered as a web-based tool or as an installed software solution.
<p>Which target groups are supposed to use these ICT tools?</p> <p>Specify the target group, i.e. managerial/operative level; vulnerable groups</p>	<p>Especially customer-relations managers, marketing managers</p>
<p>What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?</p>	<p>Topic of the training:</p> <p>related to the tools mentioned above, which cover Management and leadership related training, HR management, communication and collaboration and use of ICT in general.</p> <p>related to the competences: lack of skills related to customer relation management, strategic marketing planning, and formation and the implementation of business models.</p> <p>related to the cultural values, attitudes: raising awareness of the entrepreneurial spirit</p> <p>Types, forms, styles of implementation (do they prefer on-line trainings or face-to-face trainings: both / combination</p> <p>Target groups for the training:</p> <p>related to the tool: customer-relations managers, marketing managers</p> <p>related to the competences: lack of skills related to customer relation management, strategic marketing planning, and formation and the implementation of business models: entrepreneurs, top managers, customer-relations managers, marketing managers</p>



	<p>related to the cultural values, attitudes: raising awareness of the entrepreneurial spirit: entrepreneurs, top managers, customer-relations managers, marketing managers</p> <p>Timing of the training: estimate the duration of training that target groups would need</p> <p>training for using specific tools should be focused on getting general ICT skills and expertise, which are usable horizontally, with ena kind of specific tool, since the tools are more or less easy to use and user friendly. The duration of the training is estimated to last once per week two hours in five weeks - cca. 10 hours</p> <p>trainings for acquiring competences and gaining entrepreneurial spirit should last cca once per week four hours in five weeks - cca 20 hours</p>
Is there any specific training required for the vulnerable groups within WISEs? Specify!	No.
The main objectives ensuing from the identification of the specific need/problem	Contribute to higher competitiveness of WISE

The 2nd highest-ranking priority of WISEs	
Specify the need/problem	Perception of vulnerable groups
Explain the problem	Significant energy seems to be put into adjusting work processes for employees with particular needs, which results in improvements across the board, as evidenced by participants in the stakeholders' meeting. Although evidence of efficiency in social enterprises is available and valid, managers focus on a lack of trust towards employees with special needs and the need to oversee them. Awareness of vulnerable groups and their capabilities is lacking
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> ■ Management and leadership ■ HR management ■ Financial ■ Marketing
In which sectors the WISEs would particularly benefit from the solutions of this problem?	<ul style="list-style-type: none"> ■ all to the equal extend
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	Widespread awareness campaigns are the most likely to result in improvements over the long and short term. This is based on a significant body of work performed over the past decades. Destigmatization research shows that awareness campaigns and other forms of reducing stigma work with varying degrees of reliability, but produce statistically significant results.
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	The problem involves a lack of knowledge of the capabilities and risks associated with particular vulnerable groups.
<p>The competences of which target group precisely need to be improved in this regard?</p> <p>Specify the target group, i.e. managerial/operative level; vulnerable groups</p>	Managerial, specifically Executive officers and HR officers need to be made aware of the potential benefits and risks of employing personnel hailing from vulnerable groups.



Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	Stigma encompasses cultural issues, attitudes, values and other aspects of personality and society. Attitudes and especially values are difficult to change, but the perception of what is acceptable behaviour in public can shift rapidly. Awareness campaigns targeted at employers, management and HR representatives would produce a noticeable effect.
Are existing ICT tools applied in relation to this problem?	No
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> ■ The available ICT tools are not known to WISEs ■ WISEs lack knowledge/skills/competences to use the available ICT tools ■ Existing ICT tools are not accessible to WISE due to high costs or similar reasons ■ The required ICT tools for this specific need do not exist at all.
Which ICT tools could be realistically used to deal with the problem?	Perception of vulnerable groups could be changed by using general tools for social communication such as Facebook and others, through which this problem could be communicated.
Clarify if target groups prefer Open Source or are willing to buy those tools / what funds are available in that regard	Minimal, destigmatization efforts are mainly financed through projects
Briefly describe these tools and their key functions	Any online media, social network or other widespread communications package.
Which target groups are supposed to use these ICT tools? Specify the target group, i.e. managerial/operative level; vulnerable groups	Managerial level
What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?	<ul style="list-style-type: none"> ■ Topic of the training: Appropriate references and true capabilities and risks involved with employing vulnerable groups ■ Types, forms, styles of implementation: Any ■ Target groups for the training: Managerial level, general public, vulnerable group itself ■ Timing of the training; estimate the duration of training that target groups would need. As long as possible, as consistently as possible
Is there any specific training required for the vulnerable groups within WISEs? Specify!	
The main objectives ensuing from the identification of the specific need/problem	Improving awareness

The 3rd highest-ranking priority of WISEs

Specify the need/problem	WISEs' financing
Explain the problem	WISEs faces the lack of finance at different stages of their business development. Finance is needed especially for employing qualified staff, development of products/services, investment in equipment and ICT supporting tools and for the implementation of marketing and sales activities. Identification of a set of financing options and provision of supporting services could help WISEs in overcoming their financial problems and plan their business in advance.
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> ■ Financial



In which sectors the WISEs would particularly benefit from the solutions of this problem?	<ul style="list-style-type: none"> all to the equal extend
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	The financial solutions should address all type of WISEs. However, different type of financial solutions should be developed and implemented based on different financial needs of WISEs and of their development stages (development of product/services, start-up, growth, expansion, maturity).
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	<p>Yes, the problem involves the lack of the following competences/knowledge:</p> <ul style="list-style-type: none"> financial and accounting competences competences for communication with financial institutions lack of knowledge about the available financial tools lack of knowledge about which financial tools are appropriate for WISEs project management competences.
<p>The competences of which target group precisely need to be improved in this regard?</p> <p>Specify the target group, i.e. managerial/operative level; vulnerable groups</p>	The competences of management, financial, accounting and project management staff.
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	The problem involves the lack of entrepreneurial spirit and the attitude that WISEs should not run their business with the aim of creating profit. WISEs should be oriented to profit creation but with the aim of reinvesting the profit in WISEs development. The social attitude is usually predominant, whereas the business attitude is very low.
Are existing ICT tools applied in relation to this problem?	There are some ICT tools available on the market, but the lack of knowledge and their high costs obstruct WISEs from using them.
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> The available ICT tools do not provide proper solutions: (there are ICT tools available, but might not be adequate for WISEs) The available ICT tools are not known to WISEs WISEs lack knowledge/skills/competences to use the available ICT tools Existing ICT tools are not accessible to WISE due to high costs or similar reasons Other, namely: for the use of international ICT tools language can be an obstacle for WISEs
Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> Existing and available ones but with the provision of proper training for WISEs. The ones already used by the partners in the INNO-WISE project. The ones that should be developed within the INNO-WISE project <p>In the context of this problem (acquiring and managing funding for WISEs), the ICT tools are not very common to be used. Acquiring financing requires rather standard way of handling this problem (searching for information, meetings, contracting, ...), which does not involve ICT tools directly. However in the context of financial control and implementation there are some ICT tools that could be used in order to mitigate the risk of overspending and introducing the project management principles and tools in order to increase control over financial spending. These tools could be following:</p> <ul style="list-style-type: none"> Platforms and e-services which are providing the Information about EU/national/regional funds and cooperation platforms.



	<ul style="list-style-type: none"> Management support system tools (especially Project management tools): tools that are helping organisations with management of all kind of processes that have effect on the preparation, execution and evaluation of projects, collaboration and interaction with clients and/or stakeholders on projects, management of human resources, promotional tools and other management related tools.
Clarify if target groups prefer Open Source or are willing to buy those tools / what funds are available in that regard	They would prefer open source
Briefly describe these tools and their key functions	<p>ICT tools related to:</p> <ul style="list-style-type: none"> Information platform of EU/national/regional funds, calls and tools for WISEs' start-up financing, WISEs' development, creation of jobs for disadvantaged groups, social incubators development, development of services for WISEs etc. Financial business planning and evaluation Project management <p>Following tools could be used:</p> <ul style="list-style-type: none"> Trello: Trello is an online tool that helps teams collaborate and manage work and projects. It organizes projects into the boards and manages what is being worked on, who is working on what and where is it something in the process. In addition to that, it also allows management of documents and attachments, creating lists and notifications. Tool is completely web based with possibility to access the boards from mobile and tablet devices Podio: Podio is a cloud-based collaboration service that was founded in 2009 and acquired by Citrix in 2012. Podio is an extremely flexible and highly customizable online hub for work and communication that is user friendly and scales easily for growing businesses. Podio supplies a web-based platform for organizing team communication, business processes, data and content in project management workspaces. Users can also select business "apps" from an online app store or build their own according to project needs Bitrix24: Bitrix24 is collaboration and social intranet platform for businesses, offering wide range of tools for project management, team & client collaboration, document sharing and management, client's management, HR management, communication tools (both text and video) and their management supporting tools. It is web-based application that can also be used on-premise for enterprises. Zoho: Zoho is an online office suite and set of tools for document processing, database management, web conferencing and communication, CRM (customer relationship management), project and task management, invoicing, e-mail, social media management, human resource management, reporting and other business and management supporting tools. It is offered as a online tool with the possibility to install separate modules as the plugin in the Microsoft Word, Excel or other relevant complementary software. It also offers integration with 3rd party services such as Dropbox for document sharing, Slack for communication and Github for code repository. Odoo: Odoo (formerly OpenERP) is an integrated set of applications that offer modules for project management, billing, accounting, inventory management, manufacturing, and purchasing. Modules are integrated with each other and can exchange all kinds of necessary information. In opposite to bigger ERP system, Odoo is makes it all friendlier with a simple and clean user interface. The interface is



	<p>reminiscent of Google Drive, with just the functions you need visible. It is offered as a web-based tool or as an installed software solution.</p> <ul style="list-style-type: none"> ■ ERPNext: ERPNext is an open source project and is ERP (Enterprise Resource Planning) software. It was designed to scratch a particular itch, in this case replacing a creaky and expensive proprietary ERP implementation. It is applicable for small and medium-sized businesses in different industries such as Services, Manufacturing, Retail, Distribution and Schools. It includes modules for accounting, asset management, CRM, HRM, sales, purchase, warehouse management, and project management. It can be used as a public hosted application or downloaded and installed on the private infrastructure.
<p>Which target groups are supposed to use these ICT tools?</p> <p>Specify the target group, i.e. managerial/operative level; vulnerable groups</p>	<p>Management, financial, accounting and project management staff.</p>
<p>What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?</p>	<ul style="list-style-type: none"> ■ Topic of the training: related to the tools related to the competences: lack of financial, accounting and project management skills, ■ Types, forms, styles of implementation: training in small groups and in combination with consulting ■ Target groups for the training: management, financial, accounting and project management staff ■ Timing of the training: estimate the duration of training that target groups would need: training for using specific tools should be focused on getting general ICT skills and expertise, which are usable horizontally, with any kind of specific tool, since the tools are more or less easy to use and user friendly. The duration of the training is estimated to last once per week two hours in five weeks - cca. 10 hours 3 months course / once a week (depends on the training content and the level of case by case approach)
<p>Is there any specific training required for the vulnerable groups within WISEs? Specify!</p>	<p>No</p>
<p>The main objectives ensuing from the identification of the specific need/problem</p>	<ul style="list-style-type: none"> ■ With information provided, WISEs will have a higher potential in accessing EU/national/regional funds, calls and tools ■ With financial and accounting skills obtained, WISEs will reduce the risk of running low profit businesses ■ With project management skills obtained, WISEs will be able to plan projects in advance and assure their implementation for a more successful social business.

5.2. Croatia

Specify at least one and up to three most significant needs/problems of WISEs in your region and suggest corresponding objectives for each of them that can be achieved within the INNOWISE project.



The 1st highest-ranking priority of WISEs	
Specify the need/problem	People management
Explain the problem	All human-related challenges are emphasized (sometimes even multiplied) in the management of people with disabilities (physical and / or mental); from mentoring where one has to customize teaching approach, motivation tools (one size does not fit all), managing diversity, evaluation process has to be more personalized which can lead to dissatisfaction of others,
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> ■ Management and leadership ■ HR management ■ Financial
In which sectors the WISEs would particularly benefit from the solutions of this problem?	<ul style="list-style-type: none"> ■ sustainable tourism, ■ waste management, ■ recycling and re-use of waste
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	Cannot be specified; this is general issue - anyone could benefit the solution.
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	Yes. Management and particularly management of disabled persons and managing diversity.
The competences of which target group precisely need to be improved in this regard? Specify the target group, i.e. managerial/operative level; vulnerable groups	Firstly, managerial but also vulnerable groups.
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	Attitudes, openness towards new and change of vulnerable groups.
Are existing ICT tools applied in relation to this problem?	None. There are some HR management tools, but neither can solve the specific problems related to this issue.
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> ■ WISEs lack knowledge/skills/competences to use the available ICT tools
Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> ■ -
Clarify if target groups prefer Open Source or are willing to buy those tools / what funds are available in that regard	Open Source is not widely in use within the groups. However, since there are no funds available, target groups would prefer Open Source solutions.
Briefly describe these tools and their key functions	-
Which target groups are supposed to use these ICT tools? Specify the target group, i.e. managerial/operative level; vulnerable groups	Management
What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?	<ul style="list-style-type: none"> ■ Topic of the training: ■ Target groups for the training:



Is there any specific training required for the vulnerable groups within WISEs? Specify!	Working in diversity, teamwork
The main objectives ensuing from the identification of the specific need/problem	Slower integration of vulnerable target group, slower production process prone to mistakes, negative impact on the empowerment of vulnerable group, management lack of motivation, ...

The 2nd highest-ranking priority of WISEs	
Specify the need/problem	Unfamiliar with the (even basic) market rules
Explain the problem	Majority from vulnerable group are not familiar with basic market trends and rules making it very difficult to explain to them the concept of "competitive capacity" and competitive behaviour and need for consistency in quality of the delivery.
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> ■ Management and leadership ■ HR management ■ Financial ■ Marketing ■ ICT (in general)
In which sectors the WISEs would particularly benefit from the solutions of this problem?	<ul style="list-style-type: none"> ■ all to the equal extend
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	It would be equally beneficial.
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	Yes, mainly lack of competences from vulnerable group.
The competences of which target group precisely need to be improved in this regard? Specify the target group, i.e. managerial/operative level; vulnerable groups	Vulnerable group.
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	Only partially, attitudes of vulnerable group.
Are existing ICT tools applied in relation to this problem?	Not that we are aware
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> ■ WISEs lack knowledge/skills/competences to use the available ICT tools ■
Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> ■ Existing and available ones but with the provision of proper training for WISEs.
Clarify if target groups prefer Open Source or are willing to buy those tools / what funds are available in that regard	<ul style="list-style-type: none"> ■
Briefly describe these tools and their key functions	-
Which target groups are supposed to use these ICT tools? Specify the target group, i.e. managerial/operative level; vulnerable groups	-



What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?	<ul style="list-style-type: none"> ■ Topic of the training: Marketing and/or sales basic ■ Types, forms, styles of implementation: Workshop and training ■ Target groups for the training: Vulnerable group ■ Timing of the training; every month one session
Is there any specific training required for the vulnerable groups within WISEs? Specify!	As stated above
The main objectives ensuing from the identification of the specific need/problem	More competitive advantages

The 3rd highest-ranking priority of WISEs	
Specify the need/problem	Finance
Explain the problem	Lack of finance, especially for engaging experts and other qualified staff who can help WISEs in their business development or development of their products/services.
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> ■ Financial
In which sectors the WISEs would particularly benefit from the solutions of this problem?	<ul style="list-style-type: none"> ■ all to the equal extend
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	All types/sizes of WISEs.
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	<ul style="list-style-type: none"> - financial and accounting - project management competences - communication with investors, donors or financial institutions - not familiar with tools available
The competences of which target group precisely need to be improved in this regard? Specify the target group, i.e. managerial/operative level; vulnerable groups	Managerial level - business managers, finance managers, project managers, accounting managers.
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	Lack of entrepreneurial skills and experience. WISEs are still predominately established by non-profit organizations or public institutions, thus people on managerial level still don't have business orientated minds.
Are existing ICT tools applied in relation to this problem?	Could be
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> ■
Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> ■ Odo, i.e.
Clarify if target groups prefer Open Source or are willing to buy those tools / what funds are available in that regard	<ul style="list-style-type: none"> ■ Open Source would be better.



Briefly describe these tools and their key functions	<ul style="list-style-type: none"> ■ Project management ■ Financial Management
Which target groups are supposed to use these ICT tools? Specify the target group, i.e. managerial/operative level; vulnerable groups	Management, financial and project management staff.
What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?	<ul style="list-style-type: none"> ■ Types, forms, styles of implementation: <ul style="list-style-type: none"> ■ Trainings, mentorship and consultations ■ Target groups for the training: management, financial and project management staff ■
Is there any specific training required for the vulnerable groups within WISEs? Specify!	No
The main objectives ensuing from the identification of the specific need/problem	<ul style="list-style-type: none"> ■

5.3. Italy_Lombardy Region

Specify at least one and up to three most significant needs/problems of WISEs in your region and suggest corresponding objectives for each of them that can be achieved within the INNOWISE project.

The 1st highest-ranking priority of WISEs	
Specify the need/problem	Lack of knowledge on digital tools available for WISEs
Explain the problem	In Lombardy there are some difficulties with technological tools: WISEs use Office tools, internet, e-mail and telephone that are very common tools but not specific for enterprise. In some situations they lack skills but often the WISEs don't know the technologies available
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> Management and leadership HR management Other : employees, disadvantaged staff
In which sectors the WISEs would particularly benefit from the solutions of this problem?	<ul style="list-style-type: none"> all to the equal extent
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	Small and medium WISEs, with a number of employees between 10 and 30; they are less resources (training possibilities and economic resources). The big WISEs are more possibilities.
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	Yes, lack of knowledge on digital tools available.
The competences of which target group precisely need to be improved in this regard?	Knowledge and use of digital tools specific
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	In the most WISEs in leadership positions there are people "over 45 years" with a cultural effort to adapt to new technology ("digital illiteracy"). It is the duty of leadership and management to acquire skills and tools to be then transferred to the other categories (employees, vulnerable groups) present in WISEs.
Are existing ICT tools applied in relation to this problem?	No, but there are training possibilities
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> The available ICT tools are not known to WISEs WISEs lack knowledge/skills/competences to use the available ICT tools
Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> Existing and available ones but with the provision of proper training for WISEs. The ones already used by the partners in the INNO-WISE project. The ones that should be developed within the INNO-WISE project
Briefly describe these tools and their key functions	Training (MOOC): available tools for project management, workflow management financial management, communication, marketing and e-commerce
Which target groups are supposed to use these ICT tools?	High and medium level (manager) in all sector of enterprise.
What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?	<ul style="list-style-type: none"> Topic of the training: available tools Types, forms, styles of implementation: MOOC or web-in-air session Target groups for the training: manager

Is there any specific training required for the vulnerable groups within WISEs? Specify!	Coaching one-to-one because the vulnerable groups are very important difficulties (physical and psychological)
The main objectives ensuing from the identification of the specific need/problem	Cultural aspect: technology is facilitator for enterprises

The 2nd highest-ranking priority of WISEs	
Specify the need/problem	ICT System for Workflow Management
Explain the problem	Lombardy WISEs needs a digital system for workflow management that optimize the management, billing and reporting. The ICT system must to be economically sustainable
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> Management and leadership Financial Marketing ICT (in general)
In which sectors the WISEs would particularly benefit from the solutions of this problem?	<ul style="list-style-type: none"> all to the equal extend
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	<p>Small and medium WISEs, with a number of employees between 10 and 30; they are less resources (training possibilities and economic resources)</p> <p>The big WISEs are more possibilities.</p>
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	Technological knowledge and ICT use
The competences of which target group precisely need to be improved in this regard?	Manager (medium level)
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	Lack of knowledge and available tools
Are existing ICT tools applied in relation to this problem?	Yes
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> The available ICT tools are not known to WISEs WISEs lack knowledge/skills/competences to use the available ICT tools Existing ICT tools are not accessible to WISE due to high costs or similar reasons
Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> Existing and available ones but with the provision of proper training for WISEs. The ones already used by the partners in the INNO-WISE project. The ones that should be developed within the INNO-WISE project
Briefly describe these tools and their key functions	We need a digital tools that allows an accurate management control and putting together HR management, order management, billing and reporting
Which target groups are supposed to use these ICT tools?	HR Manager, Financial Manager, Sector Manager
What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?	<ul style="list-style-type: none"> Topic of the training: tools knowledge Types, forms, styles of implementation: operational training Target groups for the training: manager
Is there any specific training required for the vulnerable groups within WISEs? Specify!	Coaching one-to-one because the vulnerable groups are very important difficulties (physical and psychological)

The main objectives ensuing from the identification of the specific need/problem	More efficiency and greater control of production system
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The 3rd highest-ranking priority of WISEs	
Specify the need/problem	Marketing and communication social oriented
Explain the problem	Fundraising on line, social media marketing, brand building
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> Management and leadership Marketing ICT (in general)
In which sectors the WISEs would particularly benefit from the solutions of this problem?	<ul style="list-style-type: none"> all to the equal extend
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	<p>Small and medium WISEs, with a number of employees between 10 and 30; they are less resources (training possibilities and economic resources)</p> <p>The big WISEs are more possibilities.</p>
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	It is important to choose the platform; there is a specific identikit for each client-type
The competences of which target group precisely need to be improved in this regard?	Marketing manager, Communication Manager
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	The internal resources that deal with digital marketing mostly work of adequacy, if not post working
Are existing ICT tools applied in relation to this problem?	We think yes
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> The available ICT tools are not known to WISEs WISEs lack knowledge/skills/competences to use the available ICT tools Existing ICT tools are not accessible to WISE due to high costs or similar reasons
Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> Existing and available ones but with the provision of proper training for WISEs. The ones already used by the partners in the INNO-WISE project. The ones that should be developed within the INNO-WISE project
Briefly describe these tools and their key functions	The tool must be permit to WISEs to present oneself by conveying the social message with advertising and commercial objectives
Which target groups are supposed to use these ICT tools?	High and medium level
What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?	<ul style="list-style-type: none"> Topic of the training: Types, forms, styles of implementation: Target groups for the training:
Is there any specific training required for the vulnerable groups within WISEs? Specify!	Coaching one-to-one because the vulnerable groups are very important difficulties (physical and psychological)
The main objectives ensuing from the identification of the specific need/problem	To build a relationshope between brand, enterprise and public.

5.4. Italy_Trentino Region

Specify at least one and up to three most significant needs/problems of WISEs in your region and suggest corresponding objectives for each of them that can be achieved within the INNOWISE project.

The 1st highest-ranking priority of WISEs	
Specify the need/problem	<p>Lack of innovation capacity, as WISEs in Trentino region have been sustained by public spending and privileged relationship for a longer time then the rest of Italy.</p> <p>There is the need of more data gathering at the source, in order to help WISEs to see trends in performances and needs and shape together future policies.</p>
Explain the problem	<p>The the market dynamics and the policy framework is changing in the region, as WISEs are facing for profit competitors in public competitive tendering, they must enter private markets, adapt to lower prices and leverage on efficiency if they want to survive in the long run.</p>
To which functional area(s) is the problem related (delete all that does not apply)	<ul style="list-style-type: none"> ■ Management and leadership ■ HR management ■ Financial ■ ICT (in general)
In which sectors the WISEs would particularly benefit from the solutions of this problem	<ul style="list-style-type: none"> ■ others - all sectors (green area services, cleaning, business services, laundry and food services are the areas of action in Trentino region) ■
Would any particular type of WISE (size, status, etc.) particularly benefit from the solutions of this problem? What about the other WISEs?	<p>All WISEs will benefit from the solution of the problems above mentioned.</p>
Does the problem involve the lack of competence(s)/knowledge? Which ones precisely?	<p>WISEs in Trentino shows a slack of selfawareness and knowledge of the state of the art of digital tools to support leadership, management and marketing activities.</p>
<p>The competences of which target group precisely need to be improved in this regard?</p> <p>Specify the target group, i.e. managerial/operative level; vulnerable groups</p>	<p>Managerial/operative level</p>
Does the problem involve the cultural issues, attitudes, values, etc., which ones, and of which target groups precisely?	<p>The problem involves their short-term vision, which is dictated by constant threats to their survivals (strong competition, lack of resources and knowledge, barriers to credit, lower productivity, higher labour costs).</p>
Are existing ICT tools applied in relation to this problem?	<p>No but there are training possibilities</p>
What are the problem(s) related to the use of existing ICT tools related to this problem? (delete all that does not apply)	<ul style="list-style-type: none"> ■ The available ICT tools are not known to WISEs ■ WISEs lack knowledge/skills/competences to use the available ICT tools ■



Which ICT tools could be realistically used to deal with the problem?	<ul style="list-style-type: none"> Existing and available ones but with the provision of proper training for WISEs.
Clarify if target groups prefer Open Source or are willing to buy those tools / what funds are available in that regard	<ul style="list-style-type: none"> Open source but all tools specially purchased. The main barrier for the introduction of digital tools is a cultural organization rigid towards changes.
Briefly describe these tools and their key functions	Digital tools to support leadership, management and marketing activities. Productivity and efficiency can be easily enhanced through the use of digital tools.
Which target groups are supposed to use these ICT tools? Specify the target group, i.e. managerial/operative level; vulnerable groups	Managerial/operative level
What kind of training(s) (topics, implementation, target groups) will be needed in relation to these tools?	<ul style="list-style-type: none"> Topic of the training: peer-learning communities, explore new ways to transfer knowledge and innovate the way umbrella organizations deliver formation to WISEs professionals. Gamification if one of those ways: Types, forms, styles of implementation (do they prefer on-line trainings or face-to-face trainings: face to face Target groups for the training: managers/operative employees
Is there any specific training required for the vulnerable groups within WISEs? Specify!	Vulnerable groups represent almost 50% of the employees of the social cooperatives. Coaching one to one is the way to overcome physical and psychological difficulties.
The main objectives ensuing from the identification of the specific need/problem	New competences and professional must enter in the ecosystem to face the current online absence and the lack of a marketing functions.

6. JOINT STRATEGIC PRIORITIES, TRANSVERSAL ISSUES, KEY TARGETS AND IMPLEMENTATION

Based on the identified priorities for each specific region, identified common shortages and their links to the corresponding objectives, we define the three *joint strategic priorities*, relevant for all regions included in the INNO-WISEs project, namely:

1. **management of human resources:** WISEs most essential feature is their central mission of integrating deprived social groups that are often excluded from the labour market. Focusing on people they employ and find the optimal ways how to integrate them efficiently and effectively in the workflow through the application of both managerial and ICT based tools;
2. **marketing and communication:** WISEs need to improve their business performance in the market through ICT supported marketing and e-commerce tools, including the establishment of networks that will enable the creation of specific brands, connected to the broader public awareness of the WISEs' mission.
3. **confronting financial shortages:** WISEs require better skills and ICT support in terms of (1) improving their capacities to *access* to financial resources, including both public funds and private investment, as well as in terms of (2) improving capacities *managing* their financial resources.

These three joint priorities overlap with the two major *joint transversal issues*, also clearly identified through the shortages and addressed through the objectives, presented in Figure 3. They include:

- **strengthening of the entrepreneurial spirit** of WISEs, both internally, among their management and employees and also externally – to co-create a general atmosphere supporting the idea that entrepreneurship can be at the same time committed both to the ideals of social solidarity *and* to market performance;
- **improving the WISEs knowledge of the available technologies, tools and related skills**, to be able not only to follow but also to be engaged in the cutting age trends of applying ICT based tools and technologies in their operations; WISEs should be familiar with the tools that are already available to them, be able to decide, in which tools they should invest and be able to exploit them optimally.

Strengthening of entrepreneurial spirit overlaps with the three joint priorities as follows:

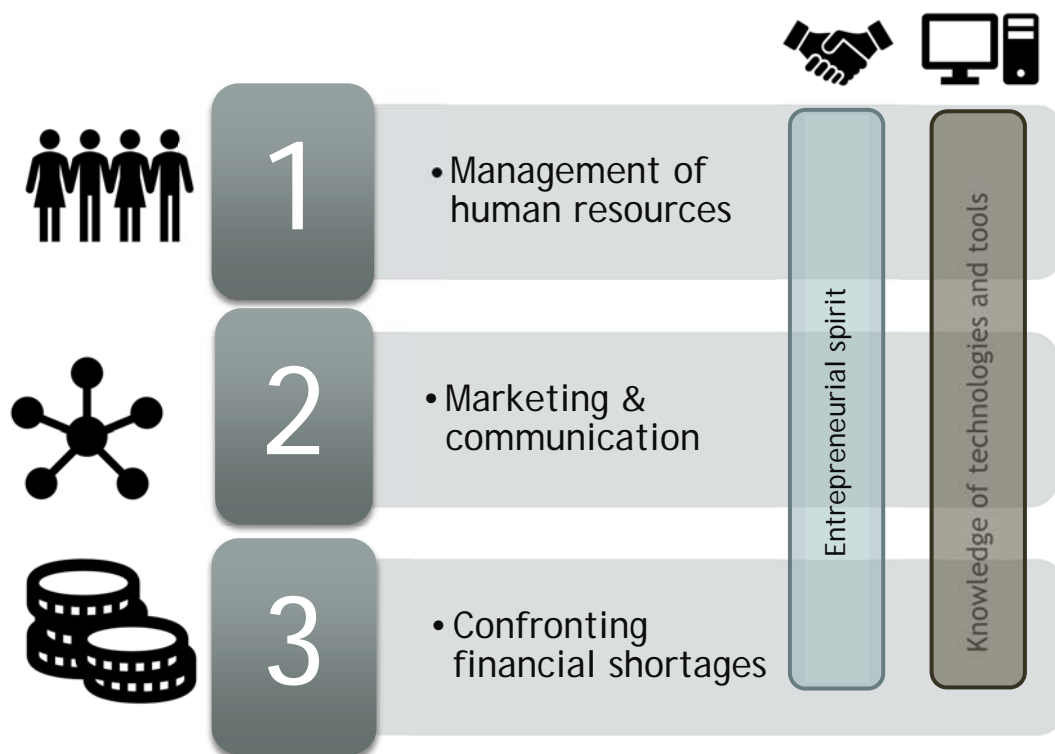
1. **Management of human resources:** all people engaged in WISEs, particularly the management but also the deprived social groups, should improve their own entrepreneurial spirit: to think innovatively, to develop their own ingenuity and become more aware that following the social mission and prospering in the market can be fully compatible.
2. **Marketing and communication:** systematic application of the available ICT tools for e-marketing and e-commerce, combined with the story-telling and brand-creation through ICT supported networks is directly linked (internally) to the development of the entrepreneurial spirit within the WISEs and (externally) to the promotion of this spirit within a broader community of their stakeholders and the general public. Entrepreneurial spirit will thus be combined with the social awareness.
3. **Confronting financial shortages:** entrepreneurial spirit is clearly the best attitude to address the financial shortages. Instead of passive waiting for financial support from the already established sources, it implies pro-active and innovative approaches in the quest for public, private and market-based sources to support WISEs activity and growth.

Improving the WISEs knowledge of the available technologies, tools and related skills also connects the three joint priorities of this strategy:

1. Management of human resources: ICT technologies are available both for management of human resources and for linking them with the workflow management. What is missing and should be addressed is, on the one hand, the adaptation of these ICT tools to the specific needs of WISEs and, on the other hand, better familiarity of WISEs with the ICT tools already available for these purposes.
2. Marketing and communication: WISEs better knowledge of the available technologies, tools and related skills in the field of marketing and e-commerce will clearly improve their performance in the market. While a development of the ICT supported network(s) would be clearly beneficial for WISEs performance, WISEs could also substantially benefit from becoming more familiar with the ICT tools that are already available for these purposes.
3. Confronting financial shortages: While this priority is mostly connected to WISEs general knowledge and attitudes regarding funding and investment, the skills for the existing ICT tools can be highly beneficial for the optimal management of financial resources.

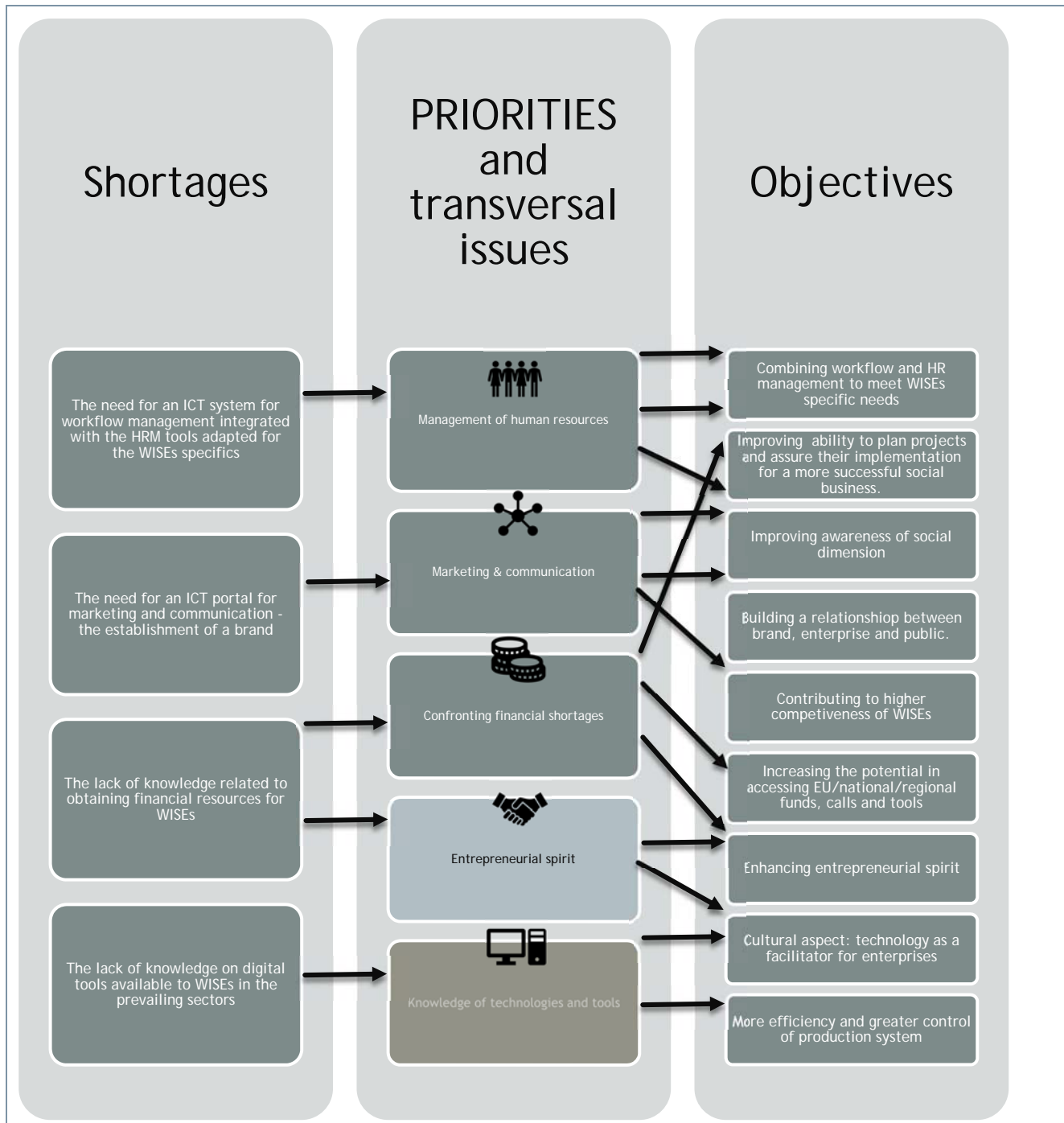
The overlapping of the joint strategic with the joint transversal issues is presented in the graphical way in Figure 5.

Figure 5: Joint strategic priorities and transversal issues



How the joint strategic priorities respond to the commonly identified shortages and how are linked to the presented strategic objectives is presented in Figure 6.

Figure 6: Joint strategic priorities as derived from the commonly identified shortages and linked to the joint strategic objectives





As the *targets* of the INNO-WISEs project actions based on these joint strategic priorities and objectives, we can identify:

- focusing on **micro and small size WISEs** because they are typically less competitive, lack more skills and technologies, when compared to the bigger WISEs, and also because they are the most common WISEs type in some of the regions;
- targeting the **managerial and operational level**, as they are those (especially in small and micro-sized WISEs) who guide the WISEs in the strategic decision making and in the every-day decision. Consequently, the development of their role and competences is of crucial significance for WISEs in general.

Regarding the *implementation*, details of which have already been described above (Chapter 2, Figure 3, and Chapter 4, Tables 4 and 5), **Priority 1 and Priority 2** can be addressed

- either through the work with the existing ICT tools in terms of existing applications (for human resource management combined with workflow management) and/or ICT supported networks
- or through the development of new ICT solutions: (1) a new application adapted for WISEs specific needs and combining human resource management with workflow management and/or (2) a new web-portal connecting WISEs with their internal and external stakeholders, enabling them to present their stories, build their brands and raise social awareness among the general public
- in any case, open source solutions shall be provided.

The decision on how to address these two priorities shall be taken within activities of workpackage T2: **General framework for WISEs technological and knowledge management models.**

Technological solutions on this basis shall be provided and tested within T3 workpackage activities: **Making key technologies readily available to WISEs employees and entrepreneurs (pilot actions).**

Priority 3, together with both transversal issues shall be addressed within T4 workpackage activities: **Building technology and managerial competences of WISEs employees and entrepreneurs.**