



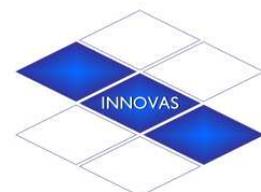
Evaluation of MNEMOS

Phase II

Interim Evaluation/Review

FINAL

March 2011



*Creating a Competitive Edge for
People, Places & Organisations*

Contents

Section	Subject	Page No
1	Introduction	1
2	Review of Evidence	5
3	Summary of Progress	17
Appendix		

March 2011

Tim C. Ashcroft & Nick Clay
Innovas Consulting Ltd

R1-2 Verdin Exchange High Street
Winsford Cheshire CW7 2AN

Main Office: 01606-551122

Website: www.innovas.co.uk

E-mail: tim.ashcroft@innovas.co.uk

I. Introduction:

In June 2010 Innovas Consulting Ltd were appointed to undertake an ongoing review of the project *Quality and innovation in Vocational Training for Enterprise Cultural Heritage Management*, hereafter referred to as MNEMOS. MNEMOS is funded by the Leonardo Da Vinci strand of the European Union's Lifelong Learning Programme (LLP). This report represents the "Interim Evaluation", or Phase II of the evaluation process.

About MNEMOS

The project aims to develop and trial an innovative training approach to exploit the potential of Enterprise Cultural Heritage (ECH) management in SMEs and to improve the quality of VET practices for non-formal learning. The project is founded on the belief that the development of new competencies and skills and the more effective use of ECH will enhance the employability of individual workers and the competitiveness of SMEs.

The premise of the project is that whilst effective ECH management can increase creativity in production and innovate knowledge management skills, and so boost the productivity performances of those SMEs with a long and rich history, most SMEs find it difficult to identify and exploit the economic added value of their cultural heritage.

The project is transnational with partners based across the EU. Partner organisations are as follows:

- **University of Salford** (UK) – this institution is the lead partner responsible for project management and administration;
- **SPIN** (Italy);
- **IDTECH** (Italy);
- **Turku School of Economics at the University of Turku** (TSE, Finland);
- **Tis Praha** (Czech Republic);
- **URENIO** (University of Thessaloniki, Greece).

The planned main project outcomes include:

- A clear understanding of the training needs of SMEs in the area of ECH management;
- The development of a methodology to introduce ECH Management in SMEs;
- A training package to support the methodology, organised in learning objects and deployed onto a suitable open source e-learning platform;
- Guidelines for the validation of non formal learning on ECH management;
- A total of 15 test cases with SMEs to validate the project results.

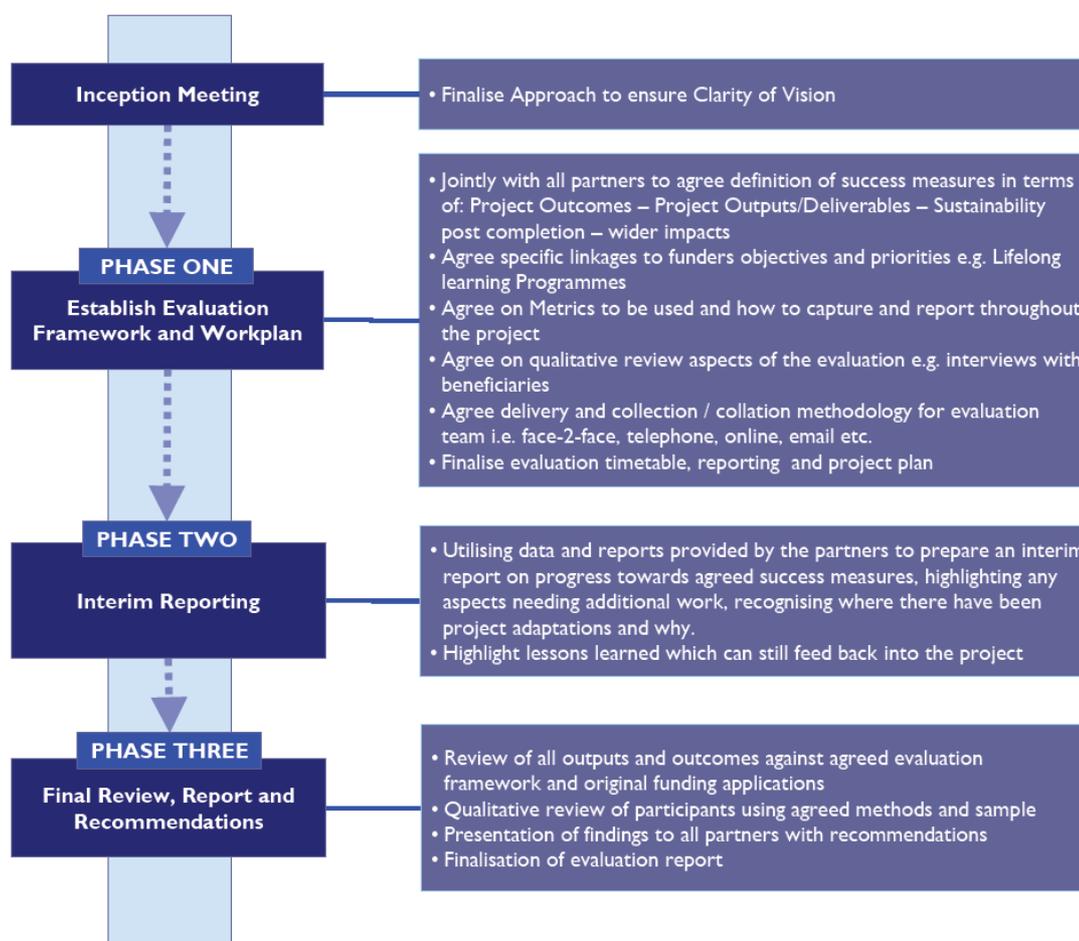
The Evaluation

Aligned to the MNEMOS research, is a requirement to undertake an evaluation. The evaluation covers the development of the MNEMOS tool against its developmental timetable, as well as the views on the development process from various stakeholder groups, drawing on evidence from a number of sources.

The evaluation thus seeks to address the following:

- Were the activities the correct ones to achieve targets?
- Was the delivery of the activities of sufficient quality to deliver the targets?
- Were the reporting and oversight/monitoring procedures appropriate?
- How could this project be developed / modified to deliver more effectively?

A summary of the evaluation process is set out below:



It is important to note that the evaluation does not cover the impact of the MNEMOS research – these impacts will not be recorded until long after the research is finished, tested and rolled out to businesses and business support agencies. The evaluation instead focuses on the process in defining and developing the ‘tools’ from which the MNEMOS partners will strive to impact on European SMEs.

The Evaluation Framework

In November Innovas completed an Evaluation Framework to support the evaluation research. The approach adopted by Innovas in developing the evaluation framework was to seek to:

1. Assess the effectiveness of the multi-partner, transnational arrangements in supporting the project partners meet their objectives;
2. Put in place a framework to allow partners to identify areas where project management and performance could be improved to (i) increase the quality of impacts and outcomes of the project itself and (ii) demonstrate the value of the ECH approach to a wider audience;
3. Derive a set of indicators which measure the project's progress & performance – during and beyond the lifetime of the project's development (and funding).

The Evaluation Framework is based on the Logic Model set out in Appendix I. The Logic Model highlights the link between the Valorisation Plan and the successful completion of the Workpackages as the precursor to a successful project.

The diagram also sets out the key areas the interim evaluation should address from the reading of the Logic Model and its developed linkages:

- Are the expected Workpackage impacts being achieved as timetabled?
- Are the Workpackage impacts leading to the generation of the proposed project outputs as expected?
- Has the Valorisation Plan ensured the relevancy of the Workpackage actions to the overall ambition of the project?
- Has there been progress towards achieving the proposed project outcomes?

Phase II Report

Given the budget, evaluation timetable, anticipated MNEMOS progress and a requirement (identified by the evaluators) to follow good practice and avoid excessive consultation with businesses, the Evaluation Framework set out the following research methods for Phase II:

Review of Project Files

The element of evidence we would expect to be most important at this phase of the research. This review will review the achievement (or otherwise) of Workpackage milestones, the achievement of SME engagement targets – both numerically and in terms of their 'profile' against the proposed SME target segments.

This exercise will also review the Project Team meetings and comment on matters arising and any emerging issues where relevant to do so

Partner Consultation & Peer Evidence

This will be based on:

- (1) A Logic Model Activity survey: In which research partners were asked to complete a basic Logic Model 'grid' detailing their activities within the project and the expected outputs and outcomes from that activity.
- (2) A questionnaire to partners to collect views on project progress, confidence in methodology and project objectives.

Evidence from SMEs

For Phase I we will draw on (i) analysis of the participating companies supporting the development and piloting of MNEMOS (ii) the evidence and research already collected by project partners relating to ECH and MNEMOS.

Key Point I

Evidence collected confirms that overall progress, has been as timetabled,

2. Review of Evidence:

I. Project Progress: File Review

Given the [timetabled] progress of the project to date, this file review offers the single greatest opportunity to evaluate the work and milestones achieved so far.

The evaluators used the breakdown of the project's Workpackages, scheduled milestones and proposed outputs set out in the Evaluation Framework, as a guide to examine the project's progress. Set out below is a tabular review of progress across each of the scheduled six Workpackages which were scheduled to commence at either project commencement or during this Phase of the evaluation.

WORKPACKAGE 1: Project Management & Administration				
Tasks/Deliverables	Planned Completion Date	Status (Jan 2010)	Evidence	Notes
(i) Administrative Key Tasks				
Establish Project Management Team (PMT)		Dec 2009 meeting sets out detailed management tasks (see below)	Project File	
Recruit Technical & Admin Officer (TAO)		Appointed Jan 2010	Project File	Evaluators have met TAO
(ii) Research Key Tasks				
Develop Logical Framework Matrix		Achieved	Project file	
Identify collaborative web application				This is to facilitate communication between partners rather than a project output per se
Workpackage Deliverables				
Project Management Plan	Dec-09	Agreed Dec 2009 meeting	Project file	
Project Meeting Minutes	Nov-09	Meeting held Dec 2009; Second meeting held June 2010	Project file	Clear timetable set out; very detailed discussion on methodology; detailed task allocation & timetable
Periodic Financial Monitoring Reports	Dec-09	Documentation as per funders requests	Project file	
Interim Report	Oct-10	Achieved	Project file	
Final Report	Oct-11			

The table highlights that the management of the project has progressed more or less as expected to date:

- Project administration and coordination systems have been established;
- There have been two successful project meetings held in which all partners were represented;
- The project minutes indicate that these meetings provided the framework for joint working and generated a mutual understanding of individual and collective tasks;
- Financial reporting mechanisms have been to an acceptable standard;
- An interim report has been submitted
- However, the project has not, thus far, identified an "internal, collaborative web application" to promote collaboration. E-mail, telephone and Skype being the favoured mechanisms of communication

Key Point 1

Project management has progressed well, and mostly as timetabled: The Project Meetings have emerged as being key mechanisms for a partnership-based approach to the study.

Key Point 2

The project has not so far identified an “internal, collaborative web application” to promote collaboration. E-mail, telephone and Skype being the favoured mechanisms of communication

WORKPACKAGE 2: ECH Needs Analysis				
Tasks/Deliverables	Planned Completion Date	Status (Jan 2010)	Evidence	Notes
Objectives/Key Tasks				
Identify the ECH training needs of SMEs across Europe				
Identify existing gaps in current heritage management training				
Desk research & analysis				
Finalisation of survey methodology (by TSE)				
Dispensation of q'aire	Dec-09	Achieved	File Copy	
Data Collection (TSE)		Achieved	Survey results presented June 2010	
Circulation & discussion of results		Achieved	Second meeting - held June 2010	
Workpackage Deliverables				
Survey of ECH Management Demand	Mar-10	Achieved	UK Report (Inventory of training related to Enterprise Cultural Heritage (ECH) management in the UK) published & distributed Jan 2010 (countries undertook their own surveys of activity)	Survey/examples of relevant courses and activities; Survey undertaken in feb/march 2010 - 77 companies took part; Difficulties with Czech data (impact of communist state) - resolved; sector and business culture reports also completed
Literature Research report	Mar-10	In progress	Copy in file	Finalised draft being circulated

The ECH Needs Analysis is one of the substantial portions of project delivery anticipated during Phase I of the report.

- The deliverables for this workpackage had been successfully completed:
 - The SME survey has been undertaken and the results (an English version) presented for inspection and dissemination;
 - A Literature Review was being circulated in its draft stage at the time of the file audit;
 - There had also been a good deal research into existing ECH-type courses and training opportunities in the following topic areas:
 - Succession planning
 - Innovation
 - Economic history of companies
 - Brand building
 - Knowledge management & Information management
 - Heritage marketing

- Individual sector studies and an introduction to business culture and business etiquette for each of the partners' home nationalities has also been produced
- The survey provides a detailed baseline of issues;
 - The results of the survey have been disseminated to project stakeholders and discussed in detail at the project partner meetings;
 - The survey also shows that partners were able to overcome significant barriers and obstacles in engaging SMEs in their locale.

Note the survey is discussed in greater detail below.

Key Point 3

The survey of SMEs investigating ECH was successfully completed. The partners also produced a detailed survey of current ECH-Type activity, if anything this research has served to inform the absence of ECH from SME/entrepreneurial support, training and development as a coherent concept – even though some individual elements of ECH are more widely available.

WORKPACKAGE 3: ECH Methodology				
Tasks/Deliverables	Planned Completion Date	Status (Jan 2010)	Evidence	Notes
Objectives/Key tasks				
Develop a Methodology Guide to plan & implement an Enterprise Cultural Heritage Management Model in SMEs				
Define an ECH Management profile in terms of competences & skills...in a given organisation				
Deliverables				
ECH methodology guide	Jul-10	Completed	Project files	Completed Q4 2010
ECH management & competencies & Skills Report	Jul-10	In progress	Project files	At a draft stage

- The deliverables for Workpackage 3 have been completed, even though the ECH Management, Competencies & Skills Report are labelled as being at a Draft Stage

WORKPACKAGE 8: Dissemination				
Tasks/Deliverables	Planned Completion Date	Status (Jan 2010)	Evidence	Notes
Objectives/Key tasks				
To disseminate & promote the project results to i) direct beneficiaries (SMEs) & to ii) other relevant bodies				Evidence of relevant activity (identifying companies for research)
Make training material available in different formats				
Deliverables				
Dissemination Plan	Jan-10	Achieved	Project file	Agreed Valorisation Plan produced
Project web-site	Feb-10	Achieved	Project file	
Project brochure	Sep-10	Achieved	Project file	
Project newsletter	Oct-11	Achieved	Project file	First newsletter March 2010
CD-Rom	Aug-11			
Booklet	Sep-11			

All schedules milestones for Workpackage 8 have been achieved. This includes:

- The establishment of a project newsletter ahead of schedule;
- The finalisation and agreement of the key Valorisation Plan

Note that a discussion of the Valorisation Plan follows below.

WORKPACKAGE 9: Exploitation of Results				
Tasks/Deliverables	Planned Completion Date	Status (Jan 2010)	Evidence	Notes
Objectives/Key tasks				
Promoting the adoption of the project outputs by the widest possible number of direct beneficiaries (established SMEs) or "intermediate" bodies				
Target the 75 SMEs involved in needs analysis (+other groups)		Achieved	File notes - presentation	
Develop agreements with SME associations to promote the product				
Develop agreements with EU initiatives and networks for growth				
Promote the exploitation of the project results		Commenced	Two newsletters produced; Website launched	
Deliverables				
Partnership exploitation agreement	Apr-10	Achieved	Copy on file	IP agreement: not yet signed
ECH Open Community Manifesto	Oct-10			

The review of Workpackge 9 shows that:

- There have been difficulties in identifying appropriate companies in the Czech Republic – but these difficulties were overcome;
- The Partnership Exploitation Agreement has now been agreed;
- Marketing and promotion activity to the potential client base (discussed under *Valorisation Plan*, below) has now commenced via newsletters and a web site has now commenced

Key Point 4

The key Valorisation Plan and Partnership Exploitation Agreement have now been agreed. With the clarity on issues such as IP, and post-funding project maintenance agreed, a MNEMOS concept can now be marketed and promoted to the target client group(s). Two MNEMOS newsletters have now been produced and circulated, and the project web site has now been launched. Both these elements will be key parts of this marketing activity

WORKPACKAGE 10: Project Evaluation				
Tasks/Deliverables	Planned Completion Date	Status (Jan 2010)	Evidence	Notes
Objectives/Key tasks				
Internal evaluation based on an Utilization-Focused approach involving the primary intended users at all stages of evaluation design and implementation.				
External evaluation to focus on the impact of the project & the summative evaluation, in order to judge the worth of the project		Achieved	File notes - presentation	
Development of key impact indicators				
Deliverables				
Internal project evaluation reports	Oct-11			
External evaluation reports	Oct-11			Internal evaluation plan produced

- This section simply reports that the evaluation has been established.

The University of Salford also reported on the time spent by partners in delivering activity so far.

	Administration		Researcher		Manager		Technical		Total		
	Reported	Application	Reported	Application	Reported	Application	Reported	Application	Reported	Application	Variance
SALFORD	79.2	120	34.93	68	54	88	0	0	256.13	276	92.8%
ID TECH	15	28	119.6	279	3	6	0	60	143.6	373	38.5%
SPIN	4	178	156.76	117	16	6	8.68	0	191.44	309.68	61.8%
TIS PRAHA	16.25	218	34.13	97	24.38	6	0	0	80.76	321	25.2%
TURKU	77.3	218	67.76	62	32.48	41	0	0	218.54	321	68.1%
URENIO	12.59	210	58.4	87	88	54	0	0	212.99	351	60.7%
TOTAL	204.34	972	471.58	710	217.86	201	8.68	60	1103.46	1951.68	56.5%

The table shows:

- Over 1000 person-days have been spent on the project so far;
- The University of Salford's time-profile is the nearest to that expected, Tis Praha the most distant;
- Researcher time is also below profile, but manager time is above that profiled in the Project Application Form

Time allocation would appear to be significantly below the planned total, but project rules provides the flexibility for projects to redistribute time and resources across the project's lifespan. Time allocation and management becomes an issue when a supported project runs out of budget.

Key Point 5

The time profile will analysed fully in the final evaluation once funded activities are at or near completion

2. The Valorisation Plan

The Valorisation Plan sets out a dissemination and exploitation strategy which:

- Reconfirms the MNEMOS objectives;
- Identifies the approaches and methods which partners will use to create awareness of the project;
- Sets out how:
 - The specific project outputs will be promoted widely
 - The exploitation of the project results will be encouraged by target groups;
- Defines a process by which partners and evaluators can assess the quality and the success of the valorisation activities;

The Plan identifies a target audience for the final MNEMOS output which are aligned to those stated in the initial Programme Application Form (PAF)¹:

¹ The PAF and original Valorisation Plan also referred to 'Companies who are members of the Associated Partners'. There are no such companies/partners. This has been removed from a subsequent edit of the Valorisation Plan;

- 75 SMEs involved in the needs analysis;
- SME associations;
- Chambers of Commerce, National Confederations of Craft Sectors & other business support organisations
- Training organisations.

Sustaining the Outputs & Achieving Impact

The Valorisation Plan commits the partners to agree a set of actions which will ensure MNEMOS can continue beyond the project's life. These actions will relate to the following measures:

- Hosting and maintenance costs of the website for a minimum period of 2 years following the end of the project;
- A commitment to continue to actively promote the project and its products to relevant actors in the European Union
- The appropriate use of the project content in ongoing higher education and vocational training courses.
- All partners will actively seek opportunities for the transfer of the project and its products to new stakeholders, sectors, geographical areas
- Expected outcomes in terms of valorisation
- End result dissemination and Application of the results

The Valorisation Plan also sets out a revised timetable for both the Partnership Exploitation Agreement (now achieved – See Workpackage 9) and the Open Community Manifesto (with the completion of the Open Community Manifesto moved to November 2010) to ensure MNEMOS is taken forward and made available to SMEs.

The Plan describes the two agreements as follows:

Partnership

Exploitation Agreement: The agreement includes general aim of the exploitation activities, IPR issues, contribution to maintaining the project web site after the end, partners' obligations

ECH Open

Community Manifesto: A licence model, tools and etiquette to join and contribute to the community

Key Point 6

The Valorisation Plan was identified as a major component of the study in the Evaluation Framework's Logic Model. The final agreed Plan reflects the objectives for this document as set out in the project methodology. The Plan sets out the target audience and the steps partners (collectively) will have to take to ensure the research is meaningful to the target audience and the final project output can be made available to that audience to make a genuine impact.

It is important to note that the Valorisation Plan is focused on practical SME support and delivery and not academic output.

2. Comments from Partners

The initial Logic Model framework provided an opportunity for partners to set out their expectations for the project in a Logic Model grid and these broadly reflect the stated Aims & Objectives of the project as set out in the Business Plan – as we would expect as this research was undertaken as the project commenced. More recently the evaluation invited partners to complete an on-line survey asking questions on the following topics:

- Overall project progress;
- Any project impacts achieved so far
- Confidence in the completion of MNEMOS as a quality SME development tool.

It should be noted that the feedback from partners was that on many elements of project progress contextualisation was necessary – the answers below being framed (i) at an early stage of the project before likely impacts on the SME sector from the completed study can be estimated with any certainty and (ii) given that the research elements of the project had only just commenced at the time of this interim report, it was to be expected that elements of the project would be delayed beyond the expectations of the pre-approval timetable. The delay being due to difficulties in finding SMEs willing to participate in the research

Views on Project Progress

- Overall, partners were very satisfied with project progress, though there were, however, some doubts expressed about the progress in individual project packages.
- These concerns do not deflect from the strong acknowledgement that the project was being well managed by the University of Salford;
- Furthermore, partners agreed that that project management had itself led to project improvements.

Key Point 7

There were concerns expressed about progress of individual elements of the project, but overall, partners are “very satisfied” with both the progress being made, and how the project is being managed by the University of Salford

Project & Workpackage Impacts

We asked a series of questions about the contribution of the workpackage outputs towards progressing towards achieving the Aims and Objectives of the project.

- Partners were satisfied the study had successfully developed a clear set of objectives they were collectively working towards. There was also confidence that the partners were securing the project’s IP through the development of an ‘Exploitation Agreement’;
- In terms of work completed so far, partners agreed that the work undertaken by partners on analysing ECH across Europe to date had been thorough, and also indicated the business survey had been successful in achieving its objectives;
- Though there was support for the analysis, opinion on some of the key outputs – the Valorisation Plan and the development of a typology of businesses – were more varied (though still largely positive);
- Overall however, partners agreed that they were now better positioned to understand the role of ECH skills and abilities than at the time the study took place.

Key Point 8

Progress so far has served to secure the research partnership – research to date had been judged as thorough and was felt to have met the anticipated objectives. The overall effect of the work completed to date was that partners were now better placed to deliver a meaningful product

Generation of Interest & Future Impacts

This section of the survey threw up some interesting observations from partners:

- Firstly, we asked partners about the feedback they had received from both businesses and/or business support agencies about their MNEMOS research. In fact feedback has been fairly mixed. Responses include:
 - “Not sure why....not many companies were enthusiastic”
 - “This depends on businesses – some want to invest more in their marketing, others don’t”
 - “We have hardly received any feedback – however, all of it has been positive”

- This is reflected in the difficulties the vast majority of partners who responded to the survey had had in recruiting SMEs onto the project. Reasons cited included:
 - The recruitment process: with too much emphasis on ‘cold calling’;
 - Underestimating the necessary resources required for this element of the project;
 - Companies having difficulties understanding the concept of ECH;
 - Some owner-managers not recognising the value of ECH to their companies.
- So far, it has really been too early for peer groups, business support agencies or policy makers to be aware of the research and show any meaningful interest
- However, partners themselves are, in the main, convinced the research will lead to the development of an “Innovative business support tool” – both the subject-area (ECH) and the trans-European nature of the project are the two most common-cited elements of “innovation” in this respect;
- Partners are less certain about the academic outputs the research will generate, though most do foresee research-based outputs flowing from the project. Time & resource pressures, together with the relative commitment of individual partners to develop academic outputs were the most commonly cited barriers:
 - “Time pressures don’t allow for a thorough examination of issues – this might compromise academic quality”
 - “Perhaps in the long term it will be possible.”
 - “Many academics have contacted us and been interested in the project. We are sure this will generate good collaboration in the future when we have more time”
 - “I think the research outputs will give us the opportunity to broaden our knowledge in this field”
 - “Nothing similar has been done before in Europe.”

Key Point 9

The project has had, and will have to overcome some significant barriers in reaching out to engage the target SMEs. Some of these barriers are generic to any business support offer, namely the constraints businesses themselves face in accessing business support. Others will involve establishing ECH as a mechanism from which the target SMEs can generate a competitive advantage.

Partners found recruiting SMEs much more difficult than anticipated for reasons which reflect each of the above groups of barriers. There are lessons from this experience which should inform how partners can better engage SMEs in the future. This experience also highlights the importance of marketing MNEMOS to intermediaries and business support networks.

Key Point 10

Time pressures to achieve the MNEMOS goals and the overall academic rigour of the fieldwork means that not all partners are anticipating a stream of academic outputs to result from the project. However the project is seen as a pre-cursor to opening a potentially rich vein of research

Final Comments

Partners' final open comments about the programme were overwhelmingly positive covering impacts, process and project management. Comments included:

- "An exciting project";
- "Given time and the amount of work, the project has done a great deal to advance our understanding of ECH";
- "The project has been quite challenging and difficult, but we believe it is an important first step to popularise this topic";
- "Making the topic known among SMEs and other stakeholders is the most important goal of this project";
- "The project appears to be in very good hands, from the management to the partners";
- "The project has identified a clear gap in the market and an opportunity for a new area of research";
- "Communication among partners needs to be improved and needs a better continuity".

Key Point 11

The key message is that partners remain enthusiastic about the research and believe the outputs remain on course to add value to existing business support provision. There is a clear task in communicating the project's objectives and outputs to stakeholders, which, going forward as the project is planned, may become a greater issue than at present.

3. Evidence From SMEs

In early 2010 partners undertook a survey across five partner countries: the UK, Italy, Greece, the Czech Republic and Finland. The survey was mostly conducted as a telephone survey with an online option, and aimed at SMEs over 40 years old, operating in the food, textiles, and other (ceramics & jewellery) craft sectors. From an identified sample of almost 480 companies, 77 interviews were completed. The response to a number of questions (for example investment in cultural heritage) indicates a pre-existing level of awareness in the topic in its broadest sense among a significant minority of companies: though this does not necessarily equate to knowledge or expertise in exploiting ECH for competitive advantage:

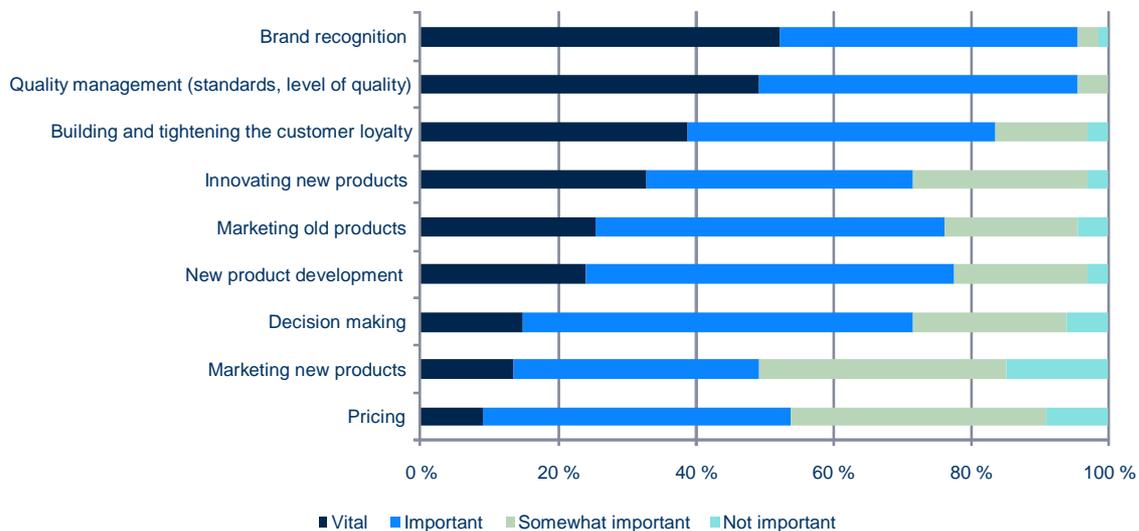
Among the detailed survey's findings were the following:

- The vast majority of survey respondents stated they believed their enterprise cultural heritage to be a resource that could add value to their business;
- The most common reason for not utilising the ECH, was lack of time;
- Throughout the survey the themes of brand management and knowledge transfer emerged as key *skill needs* among SME businesses;
- Creativity, originality and innovation are regarded to have an increasing importance for companies' competitive advantage in the future. It was recognised that ECH has the potential to become an important asset for companies in these areas – provided relevant in-company skills exist;
- Businesses will often link their company's cultural heritage with that of the heritage and traditions of the region where the company is based: The regional heritage may be part of the company brand, or the other way round – in that it is the company which may be an essential part of a region's identity;

The most common sources of competitive advantage surveyed firms linked to ECH included: Product quality, brand image and reputation, and better exploitation of product life cycles; Companies were particularly keen to link ECH with brand promotion and brand recognition.

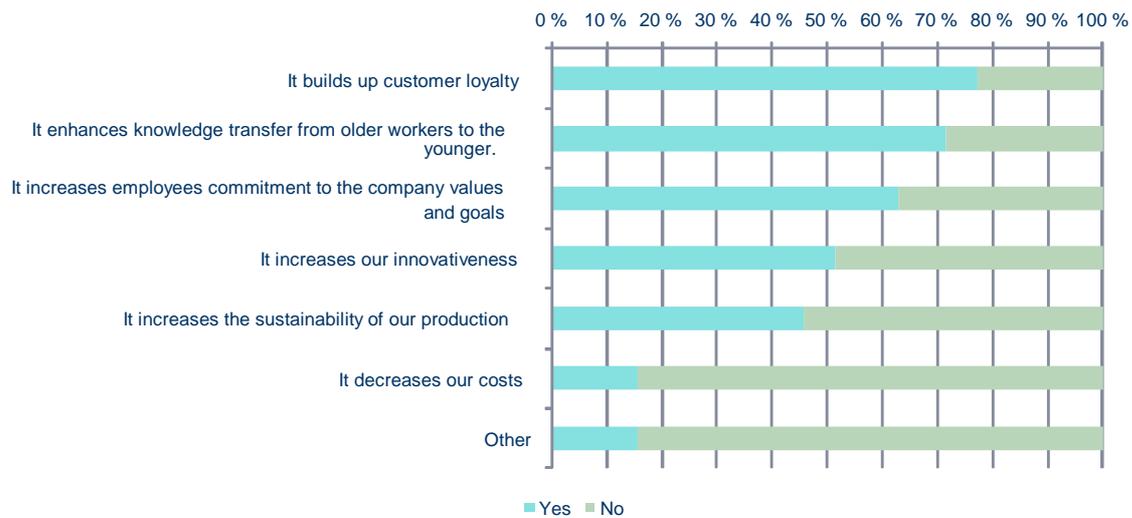
The survey results on ECH-importance, taken straight from the survey report, are set out below:

Importance of ECH in Various Fields of Business (% , n=67)



The survey also identified a range of anticipated benefits to companies who actively managed and exploited their ECH:

Anticipated Benefits of ECH Management to SMEs (% , n=70)



The key points from the survey are that:

- The evidence suggests older SMEs in craft sectors *are* interested in exploiting their cultural heritage;
- There is some awareness of the potential of ECH management among companies, but the collection of necessary historical material is not in place to facilitate company-level analysis of ECH-assets;
- The research highlights a lack of skills in the managing ECH and a lack of knowledge among companies in transforming ECH-based assets into competitive advantage;
- There is a significant proportion of SMEs who already, through being aware of ECH-issues (even though they do not recognise what they do as such), have invested in preserving and/or managing their enterprise history for business purposes;
- The survey concludes that there are clear differences in the familiarity of the subject in different countries, with Italian companies seeming to be most aware of ECH concepts and Greek companies least aware: In fact, the sample sizes are too small in each country to make a statement such as this definitive;

For the evaluators the survey shows that:

- Opportunities do exist for further research into ECH and how SMEs can exploit ECH;
- Company ECH strategies may find value in being aligned (or at least aware) of how Cultural Heritage in their locality/region is also being exploited;
- The researchers should note that many of the identified barriers SMEs cite in this survey (pre-occupation with day-to-day management; low priority or low anticipated impact, lack of skills/time etc) are not dissimilar from participating in many other forms of business support provision;
- There must be care that ECH is not seen by companies as simply an approach to raise brand awareness in its own right.

Key Point 12

The SME survey highlighted an interest among entrepreneurs in their own Enterprise Cultural Heritage and did see ECH as a source of competitive advantage. As such, this interest, together with the potential strategic 'fit' between area-based marketing for tourism and investment, makes ECH an area worthy of further research.

A key observation would be that MNEMOS will need to demonstrate to businesses that ECH is a wider concept than brand management.

In addition to the survey, the researchers have also produced a number of brief case studies of individual companies which they have visited and interviewed as part of the study process. The case studies:

- Set out a brief history of participating companies;
- Reflects on the company history, its geographic location and the production processes through which ECH is generated;
- Places the ECH in each company in the context of regional marketing and heritage strategies;
- Considers how and to what benefit ECH has been systematically identified and exploited in each company – including use of new technologies to market and disseminate information about the traditional techniques a company may use to generate ECH-based advantages.

Research Impacts: Activity & Interest

In addition to the above, the framework also calls for a review of **Research Impacts: Activity & Interest**, though it was recognised that there would probably be a greater focus on this will be in the final Phase of the study, information on emergent research and policy spin offs will be collected from the project's national partners. Again, it should be noted that MNEMOS is not academic-focused research, but a project based on generating VET-based impacts: academic outputs are therefore secondary to the project itself.

Nonetheless a research paper has been presented – at the 2010 ISBC Conference

Key Point 13

Though not a research-led project, academic outputs are beginning to be produced and disseminated as a result of MNEMOS research.

3. Summary of Progress:

Our overall conclusion is that so far this has been a well run project which has achieved its major objectives as planned whilst moving forward with a complex transnational partnership from both the private sector and University research departments. The project is well positioned, with partners excited about the potential of this research to deliver meaningful impact. However partners need to address on-going concerns about communication across partners during the development of the MNEEMOS outputs. Partners also need to consider carefully how best to engage the target client group, especially through support agencies and networks

Key Point Summary

The Key Points from the evaluation are as follows:

Key Point 1

Project management has progressed well, and mostly as timetabled: The Project Meetings have emerged as being key mechanisms for a partnership-based approach to the study.

Key Point 2

The project has not so far identified an “internal, collaborative web application” to promote collaboration. E-mail, telephone and Skype being the favoured mechanisms of communication

Key Point 3

The survey of SMEs investigating ECH was successfully completed. The partners also produced a detailed survey of current ECH-Type activity, if anything this research has served to inform the absence of ECH from SME/entrepreneurial support, training and development as a coherent concept – even though some individual elements of ECH are more widely available.

Key Point 4

The key Valorisation Plan and Partnership Exploitation Agreement have now been agreed. With the clarity on issues such as IP, and post-funding project maintenance agreed, a MNEMOS concept can now be marketed and promoted to the target client group(s). Two MNEMOS newsletters have now been produced and circulated, and the project web site has now been launched. Both these elements will be key parts of this marketing activity

Key Point 5

The time profile will be analysed fully in the final evaluation once funded activities are at or near completion.

Key Point 6

The Valorisation Plan was identified as a major component of the study in the Evaluation Framework's Logic Model. The final agreed Plan reflects the objectives for this document as set out in the project methodology. The Plan sets out the target audience and the steps partners (collectively) will have to take to ensure the research is meaningful to the target audience and the final project output can be made available to that audience to make a genuine impact.

It is important to note that the Valorisation Plan is focused on practical SME support and delivery and not academic output.

Key Point 7

There were concerns expressed about progress of individual elements of the project, but overall, partners are "very satisfied" with both the progress being made, and how the project is being managed by the University of Salford

Key Point 8

Progress so far has served to secure the research partnership – research to date had been judged as thorough and was felt to have met the anticipated objectives. The overall effect of the work completed to date was that partners were now better placed to deliver a meaningful product

Key Point 9

The project has had, and will have to overcome some significant barriers in reaching out to engage the target SMEs. Some of these barriers are generic to any business support offer, namely the constraints businesses themselves face in accessing business support. Others will involve establishing ECH as a mechanism from which the target SMEs can generate a competitive advantage.

Partners found recruiting SMEs much more difficult than anticipated for reasons which reflect each of the above groups of barriers. There are lessons from this experience which should inform how partners can better engage SMEs in the future. This experience also highlights the importance of marketing MNEMOS to intermediaries and business support networks.

Key Point 10

Time pressures to achieve the MNEMOS goals and the overall academic rigour of the fieldwork means that not all partners are anticipating a stream of academic outputs to result from the project. However the project is seen as a pre-cursor to opening a potentially rich vein of research

Key Point 11

The key message is that partners remain enthusiastic about the research and believe the outputs remain on course to add value to existing business support provision. There is a clear task in communicating the project's objectives and outputs to stakeholders, which, going forward as the project is planned, may become a greater issue than at present.

Key Point 12

The SME survey highlighted an interest among entrepreneurs in their own Enterprise Cultural Heritage and did see ECH as a source of competitive advantage. As such, this interest, together with the potential strategic 'fit' between area-based marketing for tourism and investment, makes ECH an area worthy of further research.

A key observation would be that MNEMOS will need to demonstrate to businesses that ECH is a wider concept than brand management.

Key Point 13

Though not a research-led project, academic outputs are beginning to be produced and disseminated as a result of MNEMOS research.

Review of Project Progress

Below we review progress against the key questions identified when defining the Logic Model in the Evaluation Framework:

Are the expected Workpackage impacts being achieved as timetabled?

In the main, workpackages are progressing as anticipated. There are concerns about the speed of progress among some partners, whilst some are more happy about outputs such as the Valorisation Plan than others.

Overall however partners remain enthusiastic about taking the project forward

Recommendations

Partners should look to identifying a collaborative web application – for example a Web Portal - as set out as a key milestone in Workpackage 1 to ease communication between partners.

As the project enters its crucial development phase, timescales and progress within individual workpackages becomes more crucial – The University of Salford as project administrators should set out and communicate scheduled milestones and urge partners to continue their [largely successful] efforts to date in meeting that timeframe.

Time allocated and spent against the project should continue to be monitored to ensure that as MNEMOS outputs go through a drafting stage, there is no danger of working ‘against the clock’ to complete.

Are the Workpackage impacts leading to the generation of the proposed project outputs as expected?

Partners have been particularly pleased with the SME survey as a baseline confirming interest in ECH and how it could drive SME competitiveness. The survey also showed the commitment of partners to the project in overcoming what was a project-design underestimate of the effort that would be required to identify and engage SMEs in the project.

The research team have also gone some way to secure their own partnership and develop the project on solid foundations with the development of clear agreements and an embryonic action plan which identifies the key measures partners must take to sustain MNEMOS beyond the funding timeline.

However it is at this point forward, in the design of learning materials and meaningful resources for SMEs, that the quality of the end product will start to emerge

Recommendations

It does seem surprising to us that there is no contact or reference group the research team can rely on to provide advice or support from a business perspective. The recommendation is that the University of Salford at a minimum seeks to create a Steering Group in which support from the wider business and support agency community provides a ‘cruciality check’ on the outputs being generated, to ensure they are relevant and appropriate to the business community. Other partners should be encouraged to do likewise in their own country with the comments and ideas being generated shared at Project Meetings and over the Web Portal to refine the MNEMOS outputs.

Has the Valorisation Plan ensured the relevancy of the Workpackage actions to the overall ambition of the project?

The Valorisation Plan sets out the parameters of the research in terms of the project's scope, its target client group and the stakeholder groups that could be engaged to access potential clients. The Plan does also set out an internal monitoring framework, the results of which will be studied in the next phase of the evaluation.

Crucially the Valorisation Plan sets out the partners' commitment to the Partnership Exploitation Agreement which sets out IP issues, web site maintenance commitments and general exploitation activities, as well as the ECH Open Community Manifesto to engage SMEs and stakeholders in a meaningful way

The big concern must be not that the Valorisation Plan itself is not relevant or appropriate – it clearly is – but that partners are best placed to promote and develop MNEMOS within the business support community – clearly this is the issue around the project which vexes partners the most. Progress so far would seem to have left some residual time to commit to the project, enabling partners to consider these issues.

Recommendations

The recommendation set out above - drawing in experience and expertise from the target community – equally applies here.

The University of Salford should take responsibility for (i) ensuring the timetable for deliverables are met (ii) The project continues to focus on the agreed client groups as identified in the Valorisation plan (iii) The post-funding sustainability commitments are secured and maintained

What progress has there been towards achieving the proposed project outcomes?

Finally the report can conclude that there has been progress towards achieving the project outcomes, and this has been broadly as timetabled across the project. This section has already identified some of the key actions which need to be taken to ensure MNEMOS remains meaningful in the “marketplace” both immediately once completed and then in the longer term.

In terms of the measures which will indicate progress The Evaluation Framework sets out the Workpackage-based indicators of project progress, but the above analysis and feedback in this report also indicates the following will be key measures of how the next Phase of MNEMOS will link activity so far with a provably meaningful business support and development tool:

- **Completion of a MNEMOS product to the satisfaction of all partners;**
- **The number of business networks engaged;**

- **Number of SMEs supported (as per the business support definition of seven hours);**
- **Measures of impact on beneficiary businesses;**
- **Customer (i.e. SME) satisfaction;**
- **Increased understanding and appreciation of ECH in beneficiary SMEs;**
- **ECH skills development within SMEs;**
- **Development of a future ECH research project.**

Recommendations

Project management should refer to the evaluation framework (Table 9a-9e) and the above list to identify metrics which can highlight and evidence success, impact and satisfaction among the intended client groups as MNEMOS outputs are developed – as well as providing on-going reference going forward beyond the project’s European funding: This is to showcase achievement, not just satisfy the demands of funders.

Appendix I – Project Logic Model

