

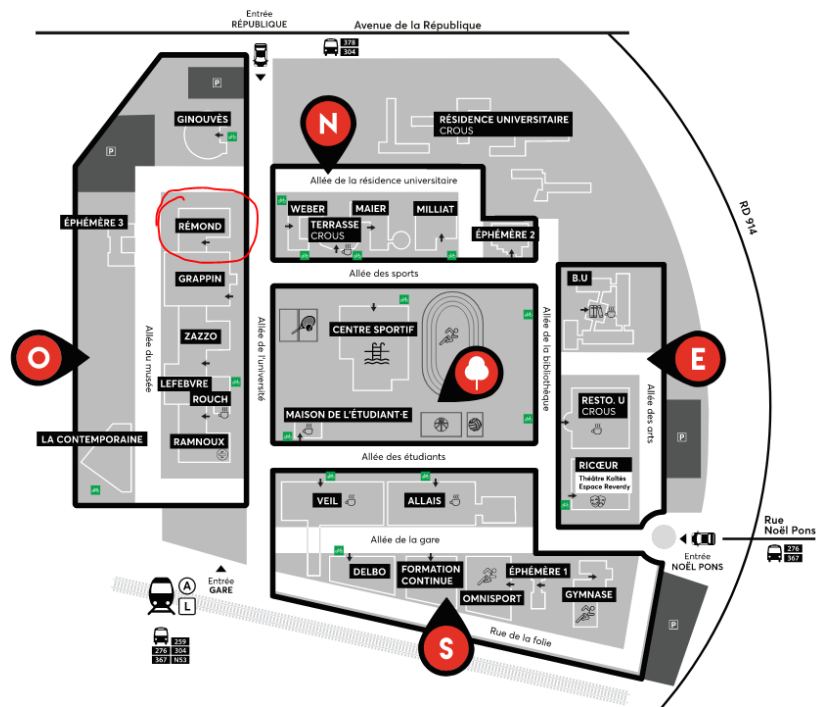
## TRANSNATIONAL PARTNER MEETING KICK-OFF MEETING AGENDA

Kick-off (first) transnational partner meeting  
**Date:** 29-30 November 2021  
**Venue:** University Paris Nanterre  
 200 avenue de la République, 92000 Nanterre  
 (train station Nanterre Université)  
**Host partner:** University Paris Nanterre



**Venue of the meeting:**  
 Meeting room of the University Paris Nanterre's international relations office :  
 Building Rémond (A), second floor, room A202

### Plan du campus de Nanterre - Université Paris Nanterre



## Contact details:

Local host:

*Céline BARREDY* Tel: +33 (0)6 85 43 12 3, E-mail: [c.barredy@parisnanterre.fr](mailto:c.barredy@parisnanterre.fr)

Coordinator:

*László VARGA* – Tel: +36 30 820 0990, E-mail: [varga.laszlo@uni-bge.hu](mailto:varga.laszlo@uni-bge.hu)

## Accommodation

List of hotels – recommended by the host partner:

Around Nanterre:

- Apparthôtel Residhome Nanterre (the closest to the university) ([website](#))
- Hôtel ibis Styles Puteaux Paris La Défense ([website](#))
- Campanile Paris Ouest Nanterre La Defense (the cheapest, but the area is not ideal) ([website](#))

In Paris:

- Hôtel Park Lane Paris (close to Auber and Saint Lazare stations: direct train to the university) ([website](#))
- New Hotel Saint Lazare (same area) ([website](#))
- Best Western Plus 61 Paris Nation Hotel (direct train at Nation station but a bit longer) ([website](#))



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**Participants of the meeting:***Indicates in-person and remote participation*

P0 – Budapest Business School (BBS), HU – Coordinator

- Sára CSILLAG (in-person)
- Gábor RÉTHI (in-person)
- Péter CSIZMADIA (in-person)
- László VARGA (in-person)
- Zsófia HANGYÁL (remotely)

P1 - University Paris Nanterre (UPN) – Host partner

- Céline BARRÉDY (in-person)
- Thierry FOUQUE (in-person)
- Antoine BEILLEVAIRE (in-person)
- Bernard QUINIO (in-person)
- Beatrice DE SEVERAC (in-person)

P2 - Tallinn University of Technology (TTU)

- Gunnar PRAUSE (in-person)
- Wolfgang GERSTLBERGER (remotely)
- Vera GERASIMOVA (remotely)

P3 - Wroclaw University of Economics and Business (WUEB)

- Grzegorz KRZOS (in-person)
- Witold SZUMOWSKI (in-person)
- Joanna MRÓZ (in-person)
- Paulina WOJCIECHOWSKA-DZIĘCIELAK (in-person)

P4 - Portuguese Catholic University (UCP)

- Eduardo CARDOSO (in-person)

P5 - CEPOR – SMEs & Entrepreneurship Policy Centre (CEPOR)

- Mirela ALPEZA (in-person)
- Danica ETEROVIC (in-person)
- Maja HAS (remotely)

P6 - ADINVEST Europe (ADINVEST)

- Isabelle CHIFFE (in-person)
- Pascal ECHARDOUR (remotely)
- David DEVINS (remotely)



## AGENDA

### DAY 0 – 28 November 2021, Sunday

19:00 Welcome drink (*financed by the participants*)

### DAY 1 – 29 November 2021, Monday

#### Morning session

Timing	Programme	Lead/responsible
09:00	Arrival, coffee, registration	
09:30	Welcome by the Host	Sonia LEHMAN-FRISCH, Vice-President for International Relations and Céline BARRÉDY, UPN
10:00	Introduction of the participants and the partner organisations	10 minutes/partners focusing on the experience on the project topic
11:15	Coffee break	
11:30	Summary of the project background, its rationale and the proposal phase	Sára CSILLAG and Péter CSIZMADIA, Budapest Business School
12:00	Introduction of the Project work plan – WPs, IOs, activities and timing Planned cooperation, communication methods	Gábor RÉTHI and László VARGA, Budapest Business School
12:30	Lunch break	

#### Afternoon session

Timing	Programme	Lead/responsible
13:30	Work packages in details WP2 – Preliminary analysis	Céline BARRÉDY, University Paris Nanterre
14:30	C1 – Short-term joint staff training event in Tallinn (TTU)	Céline BARRÉDY, University Paris Nanterre and Gunnar PRAUSE, Tallinn University of Technology
15:00	Current tasks (first project period) WP2 – Preliminary analysis	Céline BARRÉDY, University Paris Nanterre
15:30	Coffee break	

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15:45	Work packages in details WP3 – Compilation of a practical handbook	Gunnar PRAUSE, Tallinn University of Technology
16:15	Work packages in details WP4 – Training material development	Witold SZUMOWSKI/ Grzegorz KRZOS, Wroclaw University of Economics and Business and László VARGA, Budapest Business School
16:45	Work packages in details WP5 – Pilot trainings	Eduardo CARDOSO, UCP - Portuguese Catholic University
17:15	Wrap-up, open questions	
17:30	End of the day	
19:00	Project Dinner	

## DAY 2 – 30 November 2021, Tuesday

### Morning session

Timing	Programme	Lead/responsible
09:00	Arrival, registration, coffee	
09:30	Work packages in details WP6 – Sharing, exploitation & sustainability	Mirela ALPEZA, CEPOR – SMEs & Entrepreneurship Policy Centre
10:15	Work packages in details WP7 – Quality Assurance	Pascal ECHARDOUR, ADINVEST Europe
11:00	Coffee break	
11:15	Work packages in details WP1 – General Project Management	László VARGA, Budapest Business School
12:00	WP1 – Action planning Next (web-) meeting, To Do List	Gábor RÉTHI and László VARGA, Budapest Business School
12:15	Wrap-up, open questions	
12:30	End of the meeting – Lunch break	

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## MEETING MINUTES

### Welcome and introduction

The kick-off meeting of the LEAD project starts with the welcome by the host partner, University Paris Nanterre. Representative of the International Relations Department and the professional coordinator of the LEAD project on behalf of UPN, Céline BARRÉDY, greeted the participants. Sára CSILLAG, leader of the project by the Coordinator Budapest Business School also welcomed the representatives of the partners and she was pleased that the project won the ERASMUS+ grant and the implementation process could begin with such great partners.

As only BBS knows all the partners, the meeting continued with an introduction round, and the participants had the opportunity to introduce themselves and their universities/organisations as well briefly – PPTs about the introductions are available as annexes of the minutes at the Google Drive repository of the project.

### Summary of the project background and introduction of the Project work plan

Péter CSIZMADIA, Gábor RÉTHI and László VARGA spoke first about the project's background, its rationale and the proposal phase, then about the planned work packages and project results, the activities and the timing of the project.

Important parts of the presentation were the suggested methods for cooperation and communication.

### Project antecedents:

1. Research results on HRM/HRD in SMEs
  - The central role of the owner/manager in initiating and facilitating T&D activities
  - Learning environment counts: effective learning heavily depends on the managerial attitudes on human resources and learning
    - A. short/long-term approach
    - B. preferring collective or individual knowledge and learning → different consequences for HRM and HRD
2. Previous Erasmus+ projects led by the BBS (ADAPTYKES, INSIST, FAME, TRUST ME, MentorCert)

The articles that were used to the proposal writing are available at the Google Drive of the project.

- (1) Csillag, Csizmadia, Hidegh, Szászvári (2020) *A kicsi szép? Tanulás és fejlődés a kisvállalkozásokban = Is small beautiful? Learning and development at small enterprises*. *Vezetéstudomány - Budapest Management Review*, 51 (1). pp. 2-15.  
DOI <https://doi.org/10.14267/VEZTUD.2020.01.01>



- (2) Devins, Gold, Johnson, Holden (2005) A conceptual model of management learning in micro businesses, Education + Training Vol. 47 No. 8/9 2005 Emerald Group Publishing Limited
- (3) Krajcsák (2019) Leadership strategies for enhancing employee commitment in TQM, Journal of Management Development Vol. 38 No.6, 2019 Emerald Publishing Limited

#### Main goals:

- Micro enterprises (less than 9 employees) are neglected
- HRM/HRD in the focus
- To provide a training material that supports MSE owners in:
  - promoting a development-oriented managerial attitude
  - managing/facilitating learning and development at the company level more efficiently
  - improving their knowledge and skills on HRM/HRD.

#### Main activities - to do so, the project will deliver:

1. An empirical preparatory research (desk top + case studies)
2. Practical Handbook
3. Training curriculum for MSE owners/managers → both hard and soft skills
4. Pilot trainings

#### Main responsibilities:

- WP1 - General Project Management – responsible: P0 BBS
- WP2 - Preparatory analysis – responsible: P1 UPN
- PR1 Preparatory study for the orientation of the training material development – responsible: P1 UPN
- WP3 - Compilation of a practical handbook – responsible: P2 TTU
- PR2 Handbook – responsible: P2 TTU
- WP4 - Training material development – responsible: P3 WUEB
- PR3 Training materials – responsible: P3 WUEB and P0 BBS
- WP5 - Pilot trainings – responsible: P4 UCP
- WP6 - Sharing, exploitation and sustainability – responsible: P5 CEPOR
- WP7 - Quality Management – responsible: P6 ADINVEST

### Work packages in details

#### WP2 – Preliminary analysis

Péter CSIZMADIA from BBS had a presentation regarding the WP2 development, it was a good starting point for the discussions on the national report, case studies, comparative report, and the potential publications in the future.

It helped a lot the WP leader UPN team, first of Céline BARREDY, leader of the UPN team.

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Planned activities of the work package:

- PR1/A1 – Guideline development for the national analysis and the study development
- PR1/A2 – Completion of the National reports - Needs for learning and development at MSEs - more and less knowledge-intensive industries
- PR1/A3 - Analyses of needs for the Methodological and the Soft skills (WG1 and WG2) - industry-specificities and based on the Greiner growth stages
- PR1/A4 – Comparison and Study development - draft version
- C1 - Short-term joint staff training event in Tallinn (Estonia) - partly
- PR1/A5 – Evaluation by the experts of the non-university partners and associated partners
- PR1/A6 – Finalisation of the preparatory study and the recommendations for the Handbook and the Training materials
- PR1/A7 – Compiling recommendations to decision makers

First steps of the implementation process:

- Preparatory analysis to support the training material development
- Guideline → National Reports → Comparative Report
- Tentative suggestions for the content of the National Report:
  - Literature review
  - Company case study: 2 per country (based on interviews) – later can be used in an edited format as part of the training materials
- Issues to be covered:
  - skill development
  - employee motivation
  - workplace learning

### Draft structure and content of the case studies

#### 1. Introduction - Presentation of the Case (1-2 pages)

Please provide a brief description of the organisation investigated according to the following issues:

- Brief history of the firm with special attention to development cycles/periods
- Main activities
- Ownership structure
- Main characteristics of its market position (B2B, B2C, local, national, international competitors, etc.)
- Number and structure of employees (e.g., age, gender, education, skills/competencies, work experiences, etc.)
- Please also specify the main characteristics of the interviewees in a table

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## 2. The role of HRM, main HR functions and practices (3-6 pages)

*This part aims at identifying and describing the role of Human Resource Management and its practices in the company. The following HRM functions should be covered, even if they are less formalized.*

- 2.1 Recruitment and selection: labour needs, ensuring appropriate workforce
- 2.2 Career management: career design, career opportunities
- 2.3 Motivation and compensation/remuneration: wages, bonuses, other incentives (both material and symbolic)
- 2.4 Performance management and evaluation: how performance is defined, measured, and evaluated

## 3. HRM: learning and development (6-10 pages)

*The core aim of this part to provide an analysis of both company and individual learning and development processes. The following issues should be covered:*

- 3.1 Competence needs of the company: what skills and competencies are needed in different positions and how are they acquired and developed.
- 3.2. Training and development: any forms and means aiming at developing employees' (and managerial) skills and competencies, both formal and informal practices (formal trainings, OJT, mentoring, etc.)
- 3.3 Knowledge creation, utilization and sharing: how new knowledge is being created or absorbed in the accompany, all efforts made for collecting, storing, and sharing knowledge within the company (KM systems, events, networks, etc.)
- 3.4 Learning environment/motivation to learn: every aspect of the work environment influencing learning and development (e.g., social relations, managerial attitudes, workplace climate, rewards for learning, incentives, etc.)
- 3.5 Connection of knowledge management to HR functions: how the practices presented above can be linked to the already described HR functions.

## 4. Decision-making and involvement (2-3 pages)

*The aim of this part is to provide a brief overview on managerial decision-making process and the involvement of employees in that.*

- 4.1 Forms of managerial control: leadership styles, coordination, and control of the labour process
- 4.2 Decision making modes: how business and work-related decisions are being made in the organisation, who decides on what, etc.
- 4.3 Forms/channels of employee participation in decision making: to what extend and how can employees participate in decision-making.

## 5. Conclusion and lessons learned (1-2 pages)

The length of part 2 and part 3 were discussed and finally reduced a bit.

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## Draft structure and content of the National Reports

*(Preliminary Remark: The National Report should not be restricted to the academic literature. Any other relevant (operational literature) sources may be used (e.g. reports of professional associations, financial service providers, statistical offices, etc.).*

### 1. MSEs in local context: Definition, Economic weight of MSEs (4-5 pages)

- 1.1 Roles and importance of the MSEs (statistical description): e.g., share of MSEs within enterprises, share of contribution of MSEs to GDP, employment, export, etc. (depending on data available)
- 1.2. Institutional setting of MSEs: please describe as detailed as it is possible the activities of formal organisations, e.g., associations supporting MSEs.
- 1.3. Most important local trends influencing the context of MSEs: the most important issues that are shaping the environment of MSEs, e.g., digitalization, taxation, etc.
- 1.4. Effects of the COVID-crisis on MSEs

### 2. Learning and development in MSEs (8-10 pages)

- 2.1 Learning and development infrastructure: supporting institutions, legislation of training and development in MSEs, financial possibilities, any resources available
- 2.2 Education system: how T&D in MSEs can be linked to the education system of the country in general, cultural and institutional inhibitors and enablers of company-level T&D
- 2.3 HRM and HRD specificities at the country level: secondary analysis of the existing data and literature
- 2.4 Training and development at the company level in national context: secondary analysis of the existing data and literature, e.g. share of MSEs providing T&D opportunities to their employees, frequency and content of trainings, sectorial specificities, effectiveness of T&D, how company specificities influence T&D, etc.

### 3. Case study (13-23 pages)

Please insert here the completed case study

### 4. Concluding Remarks (1-2 pages)

Suggestions for the case studies – an EXCEL sheet will be prepared for the collection of the potential cases – viewpoints can be: type of industry, size of the company (nr of employees), more/less knowledge intensive, family/non-family firm, short description, why it is good for the project.

An interview guide will be also completed by BBS team in December – it can help the partners for making the suggestions for the potential case studies.

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## Work packages in details

### WP3 – Compilation of a practical handbook

Gunnar PRAUSE on behalf of TTU and Péter CSIZMADIA from BBS summarised the plans for the Handbook development, which will follow the Preparatory analysis and it will build on the results and recommendations of WP2.

The second objective is to transform the outcomes of this multifaceted analysis into a practical Handbook (PR2) for easy use of it for the varied user groups: students, owners/managers of MSEs, future qualified advisors of MSEs in HRD, called Business Coaches.

To make the analytical results useable for the target groups, the project will produce a Practical Handbook (PR2). This Handbook is expected to give guidance for the owner/managers of micro and small enterprises for the elaboration of a strategy of staff (owner/manager included) further trainings, for the student target group (future MSE owners/managers) and for MSE advisors as specialisation. A special chapter will be devoted to the proposed procedures of motivation of MSEs to start planning of further training of the staff. The Handbook is expected to be ready during the implementation.

Planned activities of the work package:

- C1 - Short-term joint staff training event in Tallinn (Estonia) - partly
- PR2/A1 - Guideline development for the Handbook compilation
- PR2/A2 - Handbook development in English - draft version
- PR2/A3 - Evaluation by the experts of the partners and associated partners
- PR2/A4 - Handbook development in English - final version
- PR2/A5 - Translation of the Handbook into the other working languages
- PR2/A6 - Revision and finalisation of the Handbook in all working languages

Summarising briefly

- Preparatory analysis to support the training material development
- Guideline → Practical Handbook
- Tentative suggestions for the content of the Handbook:
  - Summary of the lessons learned from the research
  - Methodological insights for the practitioners (good practices, HRM-related methods, etc.)

Main parts of the Handbook

- Specification of the learning and development needs of the target group MSEs;
- Specification of the existing training and development practices in MSEs;

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- Practices and methodologies for improving the MSE owners' learning and development orientation:
  - Part 1: methods and techniques that aim at developing training- and development-related methodological skill set of the target group covering:
    - Learning types and strategies
    - Competence mapping
    - Training (and job) design (person-job fit)
    - Design and development of training tools and materials (methodology)
    - Digital training techniques (tools and methods)
  - Part 2: improvement of the social skills necessary to facilitating and mentoring learning processes in the MSEs:
    - Didactical skills and competencies
    - Communication
    - Questioning and feedback
    - Effective facilitation
    - Mentoring

#### Indicators

- Planned length of the Handbook: 60 pages
- Planned number of chapters: 5
- English proofreading of PR2 final outcome by P2 TTU

#### Potential structure – ideas by TTU:

- Handbook Chapters
  - Specification of the learning and development needs of the target group MSEs;
  - Specification of the existing training and development practices in MSEs;
  - Practices and methodologies for improving the MSE owners' learning and development orientation:
    - Part 1: methods and techniques
    - Part 2: improvement of social skills
- Additional Content
  - Analytical results
  - Practical guidelines
  - Tool box (?)
  - Training material
  - Industry specifics
  - Greiner growth stages



Open questions:

- Frames & templates for WP2 – analysis results
- How to cover the target groups
- Detailed structure of WP3-Handbook
- Digitalisation of handbook results
  - MOOC
  - Cases for training
  - Tool box (?)

## Work packages in details

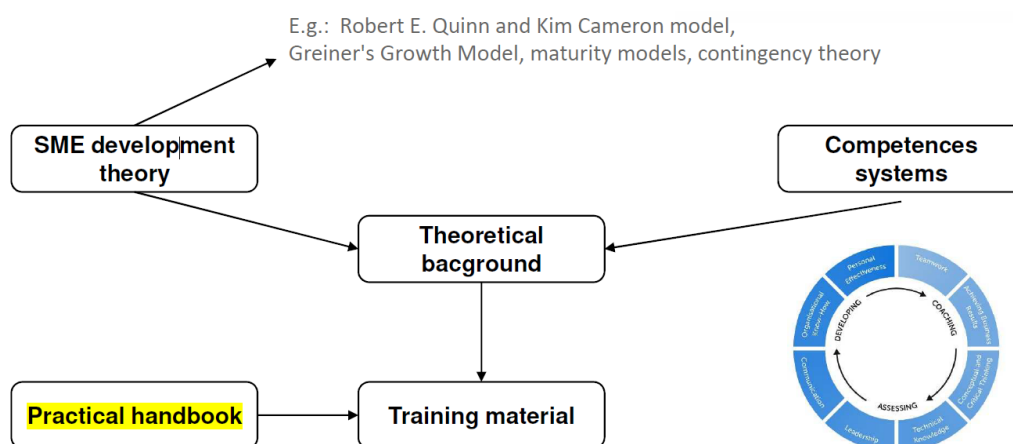
### WP4 – Training material development

On behalf of the WP leader WUEB, Witold SZUMOWSKI presented shortly the main elements of WP4, and the approach of WUEB regarding the development process. The aim of the WP4 task is to develop a comprehensive training material and guide that promotes a learning- and development-oriented leadership approach among micro and small company owners by enabling them to manage the training and development activities in their companies, including the identification of competence needs and the active facilitation of workplace learning, among others. The training material aims at developing both hard and soft skills related to training and development.

Training material structure:

- e-learning courses (as a separated product – content only),
- attainment of the training goals,
- instructions for trainers,
- presentations in power point,
- case studies, tests, surveys.

The approach of the WP leader WUEB team:



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## Work packages in details

### WP5 – Pilot trainings

Eduardo CARDOSO from UCP spoke about the plans for the pilot trainings.

After having finished the elaboration of the training modules pilot trainings will help test these results. Piloting of the PR3 results will be considered in each of the 7 countries as a multiplier event. These test activities will be structured and harmonised by a working group led by P4.

In Month 24-26 – having elaborated the Handbook and the training modules for both soft skills and methodological skills, in each of the 7 countries these materials will be tested according to some local specification.

- Piloting in Hungary - Lead: P0
  - Piloting in France - Lead: P1
  - Piloting in Estonia - Lead: P2
  - Piloting in Poland - Lead: P3
  - Piloting in Portugal - Lead: P4
  - Piloting in Croatia - Lead: P5
  - Piloting in Belgium - Lead: P6
    - Local Participants: 15
- 
- All partners will nominate at the beginning the potential sectors from which they plan to recruit pilot training participants. We plan different programme elements depending on the size and maturity of the participating companies.
  - The pilot training is planned with 2 days of personal participation, and between the 2 days we plan individual learning.
  - The face-to-face days will be based mainly on the Handbook, the methods and practical elements for the development of soft skills.
  - E-learning materials are suitable for acquiring additional knowledge elements. In case of restrictions for personal meetings the face-to-face days can be substituted by online meetings.
  - Planned participants: minimum 15 MSEs from different regions of the participating countries – involving entrepreneurs from a disadvantaged regions and entrepreneurs with disabilities as well.

Planned programme of the pilot trainings:

- Day 0 – online introductory session
- Between Day 0 and Day 1 – individual learning using part of the e-learning materials – focusing methodological skills
- Day 1 – face-to-face training session – focusing on the development of soft skills

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- Between Day 1 and Day 2 – individual learning using part of the e-learning materials – focusing methodological skills and as a home work, helping the development of a draft training strategy at their enterprise
- Day 2 – face-to-face training session – focusing on the development of soft skills, and moderated breakout sessions for the evaluation of the draft training strategies in small groups, also providing the opportunity for the experience exchange
- Recruiting candidates for the trainings will be helped by the associated partners on local and regional level.
- The leader of the piloting activities is P4 UCP, who will help the planning of the pilot trainings in all partner countries.
- UCP will precise the selection criteria for the attendees of the trainings in order to ensure the homogeneous level of these participants.
- Evaluation of the pilot trainings will be supported by P6, the leader of the Quality Assurance work package as well.

## Work packages in details

### WP6 – Sharing, exploitation & sustainability

Mire ALPEZA on behalf of CEPOR as WP leader presented the plans regarding Sharing (dissemination) and Exploitation of the project results.

Key questions:

- What are we sharing?
- To whom?
- Why would that interest them?
- Who should share?
- What is in there for us (project partners)?
- How will we do it?
  - ... to be explained in dissemination plan (coming up soon)

What are we sharing ... officially?

- Analysis on training needs of MSEs in 6 countries -> Practical Handbook -> Training Material

What are our messages?

- We understand the problems entrepreneurs are facing when hiring, training, motivating and trying to keep employees. We've done research in 6 countries on that topic.
- Based on real examples we've studied - we have identified good practices and set of recommendations for entrepreneurs on how to be (more) successful in managing people.

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- We are eager to organize a friendly and safe environment for you and your peers where you will discuss our best practices and see what works for you. We look forward to hearing you feedback.

#### To whom?

- EU level / international
  - Policy makers in education
  - MSE networks and organizations
  - Other HEIs and SME educators
- Nationally
  - MSE stakeholders (banks, universities)
  - MSE organizations and networks
  - Policy makers in education
  - Other HEIs and SME educators
  - Associated partners
- Locally / regionally
  - MSE organizations and networks
  - Entrepreneurship supporting institutions (advisors, banks, educators)
- Within our organization
  - Our colleagues, other teaching staff
  - Students

#### What tools can we use?

- Project website (ADINVEST)
- LEAD project page at our institutional websites linked to main LEAD website
- Digital LEAD newsletter published quarterly
- Two project online flyers in English translated in all 6 local languages
- LEAD accounts on social media: FB, LinkedIn, Twitter (?)
- Shared posts on our institutional and personal (optional) social media accounts
- Multiplier events / dissemination events / trainings

#### Planned activities and timing:

- A7 Preparation of dissemination plan: M1-M6
- A8 Preparation of dissemination material - Continuous update of website(s): M5-M30
- A9 Participation in local and international events (online and personal), promoting project activities and results - Organization of multiplier events / dissemination workshops: M29-M30
- A10 Completion of scientific articles - 2 published in international journals; 1 per country in national journals: M27-M30

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- A11 Integrating the new VET/HE training programmes into the portfolio of the partners: M28-M30
- A12 Conceptualisation of follow-up activities and preparation of follow-up projects: M24-M30

### Conclusion

- This WP is to maximise the visibility of the project's products and outputs to a wider national and international audience.
- All partners will participate in the dissemination activities all the way through project implementation in line with prescriptions of the dissemination plan. – with support of CEPOR, BBS and ADINVEST.
- Precondition: That we do a good job we believe in and that we are proud of.

### Work packages in details

#### WP7 – Quality Assurance

Pascal ECHAROUR from ADINVEST Europe, leader of WP7 joined the meeting remotely, and spoke about the Quality Assurance & Monitoring → Roles, Process, Deliveries → Indicators, Tools, Plan & Objectives

Quality .... What's for? TO OBTAIN THE EXPECTED RESULTS

#### ROLES: Tasks, roles and contributions

- Active collaborative participation
  - Academic partners
  - Non-university partners
- For the deliverable consistency and relevance

#### PROCESS: Participative Process

- An active participative process to encouraged activities /
  - between the partners?
  - with the stakeholders involved in the various phases of the project.
- The collaborative and on-line tools
  - web-conferences with sharing screen and applications facility;
  - website with on-the-fly content presentation depending on user's access rights or type; on-line forms and feedback systems;
- The face-to-face meeting structured to reinforce this active participation of the partners and to make contributions, inputs and feedbacks emerge as early as possible.

PROCESS: Multiplier events – how the partners would ensure that the planned number of participants will attend the events

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- Number of expected participants
- Relevant target groups.
- Cooperation with non-university partners close to the real entrepreneurial milieu to improve impact

PROCESS: Dashboard

- Leading activities validation; each partner in charge of a module/section
  - will review and amend the tasks he/she is in charge of in the project,
  - bilateral discussion with the quality assurance manager,

Indicators / tasks	Green = all relevant criteria to the corresponding milestone are achieved	Orange= all reduced relevant criteria to the corresponding milestone are achieved	Red = not done or at risk (in relation to the corresponding milestone)	Y2 - Q3 (04/22-06/22)
- Continuous monitoring of the workplan - Monitoring of the partners' financial reports - Coospace monitoring	All partners updated all data to the Intranet of the Project (CooSpace)	At least one partner did not uploaded	At least 2 partners did not upload data for 3 months	Partnership well managed. Minutes always delivered in short delay after the meeting. Administrative issue - partners financial reports accurately controlled.

...this empowers the partner and make him/her familiar with the on-line dashboard tool.

DELIVERIES: The 6 C's evaluation of the deliverables

The 6 C's	Description	Evaluation	Points 1-5
Complete	accurate representation of the work		
Clear	easy to understand, well-structured and focused, translation readiness		
Concise	focused on the essential topics		
Consistent	with the other parts, in terms of vocabulary, definitions, concepts, standards		
Correct	without mistakes or omissions		
Credible	workable output, involving sufficient testing, and covering the initial objectives.		

...assess expected specifications (content, structure)



Summary:

1 - Questionnaires:

Partner Meetings, Periodical Reports, Pilots

2 - Dashboard:

Ongoing process, quality indicators

3 – Deliverable reviews:

Each project outputs

## Work packages in details

### WP1 – General Project Management

#### Administrative and Financial Issues

László Varga from the coordinator Budapest Business School presented the administrative and financial issues – rules, regulations and plans of the coordinator regarding the smooth and efficient management of the LEAD project.

Based on the experiences from previous and ongoing project the coordinator initiates the followings:

- the *grant agreement* of the project and its annexes are in Hungarian, but as BBS receives the official English language translations from the Hungarian ERASMUS+ Agency, those will be shared with the partners
- *partner agreements* with the partners – BBS will send the template of the partner agreement to the partners for completion with the missing data; after signing by both parties, BBS will transfer the first pre-financing payment toward the partners (40% of the total grant)
- *reporting and pre-financing*:
  - o 3 reports have to be submitted by the coordinator during the project lifetime: Progress Report about the first project period, Interim Report about first 19 months of the implementation process and Final Report about the whole project duration – there will be 2 months for the completion of the report and their annexes
  - o After signing the grant agreement BBS will receive the pre-financing payment; BBS will transfer forward 40% of the grant to the partners after signing the partner agreements; BBS will transfer to the partners the next 40% of the grant after the acceptance of the Progress Report by the Hungarian ERASMUS+ Agency; finally the balance payment (20%) will be paid by the Agency after the acceptance of the Final Report.
- *financial reporting* by the partners on a 3-4-month basis (not only to the Progress, Interim and Final Report) – this financial report can be together with the report on the dissemination activities and the quality issues on a periodic basis)
- *details about financial reporting* are available in the PPT and in more details in the annexes of the grant agreement – e.g. total project budget and budget on the

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different budget lines, what kind of spending can be covered from the different budget headings, unit costs vs real costs; list of supporting documents about the usage of the costs

- partners should use a *Google Drive* as a repository of the project documentation, templates, working documents, etc.:

[https://drive.google.com/drive/folders/1b14B7Ullw8XCcHpkKRTLpzj8ZbG\\_zOtH](https://drive.google.com/drive/folders/1b14B7Ullw8XCcHpkKRTLpzj8ZbG_zOtH)

All project related documents will be uploaded there – working documents of Project Results as well

- *Logo selection*: partners voted on the LEAD project logo during the partner meeting and finally selected the following one:



The coloured version will be prepared after the kick-off meeting.

- Website domain of the project – arranged by ADINVEST Europe:  
<https://www.lead-mse-project.eu>
- Webpages at the institutional websites of the partners are also important elements of the dissemination – with direct link to the main project website
- Teams will be used for web-meetings – using the MS Teams platform of BBS
- Closing and feedback on the kick-off: partner should fill in the related *survey about the kick-off meeting* at the following link:  
<https://docs.google.com/forms/d/e/1FAIpQLScWdwcET4r1CnHI6b3LvzMVgXENn3UuY6sR012ZTJI75iIBWw/viewform>

### Next transnational partner meeting:

Planned date: 16-20 May 2022 in Tallinn, Estonia, together with the Transnational training event

### Next web-meeting:

It is planned for January 2022. Doodle voting will be sent to the partner by BBS for scheduling the meeting in the first half of January.



## Action Planning - until the Second partner meeting – May 2022

Task	Deadline	Responsible
<b>WP1 General Project Management</b>		
Signing Grant Agreement	20 December 2021	BBS + HU National Agency
Signed partner agreements - Sending to BBS - Back to the partners	15 January 2022 15 February 2022	All partners BBS
Transfer – 1st pre-financing payment	28 February 2022	BBS
Financial reporting by the partners (about the first 4 months)	15 March 2022	All partners
Web-meetings	Jan, Feb & March 2022	BBS
Transnational training event and Second partner meeting in Tallinn	16-20 May 2022	TTU and BBS

Task	Deadline	Responsible
<b>WP2 Preparatory analysis – PR1 Preparatory study</b>		
Guideline for the national analysis and the case studies + interview guide (review and finalisation) Suggestions for the case studies Deciding on the cases	8 December 2021 15 December 2021 15 January 2022 31 January 2022	UPN and BBS + review by All partners
National report – desk-top analysis Completion of the Case studies National reports – final versions	14 March 2022 15 April 2022 29 April 2022	All partners led by UPN
Comparative study (draft is needed for the C1 Training event)	31 May 2022	UPN, helped by All partners
Evaluation by the experts of the non-university / associated partners	15 June 2022	UPN, helped by MAC-Team and All partners
Finalisation of the Comparative study and recommendations for the Handbook and the Training materials	30 June 2022	UPN, helped by All partners
Agenda for the C1 Training event	31 March 2022	UPN, TTU and BBS

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Task	Deadline	Responsible
<b>WP3 Compilation of a practical handbook – PR2 Handbook</b>		
Guideline for the handbook development – structure and work distribution (draft version, review by the partners and finalisation)	9 May 2022	TTU+ review by All partners
	20 May 2022	
	31 May 2022	
Start of the Handbook development	From May 2022	All partners, led by TTU

Task	Deadline	Responsible
<b>WP6 Sharing, exploitation and sustainability</b>		
Dissemination activity table template	15 January 2022	CEPOR and BBS
Development of sharing strategy and plan - working out the dissemination tools/channels (draft, review and finalisation)	16 March 2022	CEPOR, helped by All partners
	31 March 2022	
	15 April 2022	
Project website Partners' webpages	31 January 2022	ADINVEST, CEPOR and BBS All partners
	28 February 2022	
First Project flyer Project PPT (draft, review and finalisation)	16 March 2022	CEPOR and BBS
	31 March 2022	
	15 April 2022	
Newsletter, LinkedIn, Facebook, Twitter	???	

Task	Deadline	Responsible
<b>WP7 Quality Management</b>		
Quality management plan (draft, review and finalisation)	14 January 2022	ADINVEST, helped by BBS
	31 January 2022	
	14 February 2022	
Quality management dashboard (draft)	14 January 2022	ADINVEST, helped by BBS
Quality management dashboard (completion by the WP/PR leaders)	28 February 2022	All partners, helped by ADINVEST and BBS
Quality management dashboard (final – ready to use)	29 April 2022 for the 2nd partner meeting	ADINVEST, helped by BBS

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Group photo from the meeting:



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