

Stakeholder Engagement Plan



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1. Introduction

EXAM 4.0 is a project in which stakeholder relations are key for success. The involvement of relevant actors in building regional skills ecosystems is an essential component of the Centres of Vocational Excellence concept, as defined by the European Commission (2019)¹:

"Vocational excellence means going beyond what VET would normally be expected to do. It means, in particular: being a proactive player with systematic approaches to engaging with local and regional agendas for sustainability and social and economic development; having two-way reciprocal exchanges with stakeholders, based on partnerships; using sustainable funding models involving strong and reliable stakeholder contributions; ensuring integration of activities, especially between research and teaching and learning."

This report aims at improving the targeting strategies of partners when it comes to stakeholder engagement activities. In this sense, it complements the project Dissemination Plan (March 2020), the Identification of Dissemination Opportunities and Reporting Guide (June 2020), and the Exploitation and Sustainability Plan (December 2020).

In the context of this strategic project as a pilot initiative for Centres of Vocational Excellence, the discussions and exchange on the grass root level will be brought up to the European level and to the different policy and decision-making stakeholders. Partner activities that organised with these goals in mind will provide the space not only to share best practices between stakeholders, but also find areas where common action is needed and policy reform must be initiated.

2. Stakeholder identification and targeting strategy and self-assessment survey (update of chapter 1 of the Exploitation and Sustainability Plan)

¹ European Commission (2019), *Mapping of Centres of Vocational Excellence*, available at: <https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8250&furtherPubs=yes>.

This chapter is meant to assist the partners in the EU-funded project EXAM 4.0 in reaching out to stakeholders. Significant emphasis is placed on the impact of the Erasmus+ programme, the Centres of Vocational Excellence initiative by the European Commission, and on ensuring that what they produce will be widely known about and widely used and supported. The results generated, lessons learned, and the experience gained by the project should be made available to the widest possible community. Moreover, a further direct engagement of stakeholders is expected in the second year of the project in order to build a consistent platform of vocational excellence in the field of advanced manufacturing (AM).

The purposes of stakeholder involvement within EXAM 4.0 are

- a) to raise awareness about excellence in VET, more concretely in the AM sector;
- b) to attract relevant stakeholders who are active in the AM sector, in order to build a platform of vocational excellence and an engaged online community of practice.
- c) To gather support for the development of smart specialisation strategies; and
- d) To guarantee an appropriate transfer of knowledge among similar organisations and partners beyond the EXAM 4.0 consortium.

2.1. Who are stakeholders?

Stakeholders are those who may be affected by or have an effect on an effort/initiative/project. They may also include people who have a strong interest in the project for academic, institutional, professional, or political reasons, even though they are not directly affected by it.

One way to characterize stakeholders is by their relationship to the initiative in question:

- **Primary stakeholders** are the people or groups that stand to be directly affected, either positively or negatively, by an initiative or the actions of an agency, institution, or organization. In our case, and more specifically the AM sector: VET learners, teachers, and centre management teams; human resources, business development and innovation teams within companies; officers and policy makers within regional and local administration; research centres and universities.
- **Secondary stakeholders** are people or groups that are indirectly affected, either positively or negatively, by an initiative or the actions of an agency, institution, or organization. For EXAM 4.0 secondary stakeholders are: education institutions in general, professional associations, employers, trade unions, quality assurance bodies, career guidance agencies, etc.
- **Key stakeholders**, who might belong to either or neither of the first two groups, are those who can have a positive or negative effect on an initiative,

or who are important within or to an organization, agency, or institution engaged in a project. These key stakeholders are:

- Policy makers and officials introducing the laws but also executing them.
- Those who can influence others, like media,
- Those with an interest in the outcome of the project: businesses, employers, EU institutions, international organisations, regional governments, etc.

2.2. Why identifying and analysing stakeholders and their interest

The most important reason for identifying and understanding stakeholders is that this allows the partnership to recruit them as part of the project and ensure an impactful sustainability. The involvement of stakeholders is among the project objectives as it aims to build a community and platform of VET excellence in AM. Furthermore, from a dissemination perspective, involving representation of as many stakeholders as possible has a number of important advantages for projects like EXAM 4.0 and its partners:

- It puts more ideas on the table than would be the case if the development and implementation of the project were confined to a small group of like-minded experts.
- It includes varied perspectives from all sectors and elements of the context affected.
- It is fair to everyone. All stakeholders can have a say in the development of an initiative that may affect them.
- It saves the partners from being blindsided by concerns they did not know about.
- It strengthens the project position if there's opposition. Having all stakeholders on board makes a huge difference in terms of political and educational clout.
- It increases the credibility of the partner's organizations.
- It increases the chances for the success of the project.

How can each of you identify the stakeholders operating in your national/regional/local context?:

- Brainstorm with people in your organisation.
- Consult with other organisations that are or have been involved in similar projects.
- Get more ideas from stakeholders as you identify them.
- Social media, emails, participation in conferences, and word of mouth.

How do you produce a coherent stakeholders' list? Answer the following questions about each group you have identified in the above:

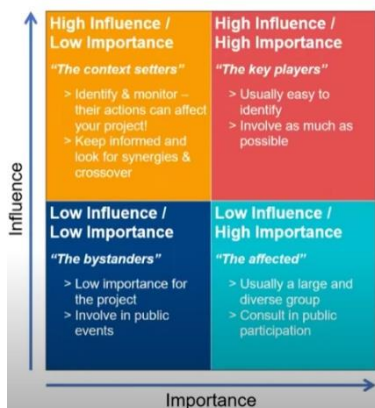
1. Does the stakeholder have a fundamental impact on your organization's performance? (Required response: yes.)
2. Can you clearly identify what you want from the stakeholder? (Required response: yes.)
3. Is the relationship dynamic — that is, do you want it to grow? (Required response: yes.)
4. Can you exist without or easily replace the stakeholder? (Required response: no.)
5. Has the stakeholder already been identified through another relationship? (Required response: no.)

(Kenny, 2014)²

Furthermore, in the very context of EXAM 4.0, the following sections should be added:

1. Is the stakeholder a part of the quadruple axis (education/business/government/civil society)? (Required response: yes)
2. Is the stakeholder directly involved in the AM sector? (Required response: yes)
3. Will the stakeholder provide an added value to the EXAM 4.0 platform of excellence (Required response: yes)

A Stakeholder information sheet to help you to collect information about the stakeholders operating in your organisation's context is available in the Exploitation and Sustainability Plan and in this very document (Annex I).



Last but not least, once you have identified your stakeholders, it can be useful to build a power/interest matrix (see image on the left) that helps you identify different levels of engagement for your stakeholders and develop activities accordingly. You can find more information about how to build it here:

<https://www.youtube.com/watch?v=ZhCQo0ny1io&ab>.

Source: https://www.youtube.com/watch?v=ZhCQo0ny1io&ab_channel=URBACT.

2.3. Keeping Stakeholders involved

Stakeholder retention is probably the most challenging part after a first contact is established. New stakeholders may need to be brought in as time goes on. Old ones may cease to be actual stakeholders, but may retain an interest in the project and

² G. Kenny, "Five Questions to Identify Key Stakeholders," Harvard Business Review (6 March 2014). Available at: <https://hbr.org/2014/03/five-questions-to-identify-key-stakeholders>.

may therefore continue to be included. Project partners have to maintain stakeholders' and supporters' motivation, keep them informed, and/or continue to find meaningful work for them to do if we want to keep them involved and active. Understanding and engaging stakeholders can be tremendously helpful to EXAM 4.0, but only if it results in their ownership of it and long-term commitment to it. And that depends on our continuing attention.

To this aim, an active community of practice is to be launched on LinkedIn (LinkedIn groups), which will act as a further step into the engagement funnel for stakeholders who eventually could join the EXAM 4.0 platform. The group will be facilitated by project partners' appointed communication contact points, who will post regular updates on it and foster conversation.

3. Stakeholder engagement opportunities

Once identified, the right place and time are essential to attract the attention of stakeholders and introduce them to EXAM 4.0 and the platform. Therefore, below a non-exhaustive list of opportunities for engagement is provided:

- Events organised by local, regional and national authorities: info-days, stakeholder relations meetings, structured dialogues, etc. Please bear in mind the importance of sector specificity that was explained in the previous point.
- Industry sector events: congresses, professional organisations' meetings, etc.
- Education sector events: open days, school fairs, etc.
- Own organised meetings and events (cold calling).

Among other means, you can use the following ones:

- Handing visit cards at events.
- Private messages at online events (Zoom, etc.).
- Targeted e-mails and phone calls.
- Reaching out through common contacts and networking.

Please always bear in mind the importance of complying with Regulation (EU) 2016/679 (also known as GDPR, General Data Protection Regulation) and avoid any means of spam.

3.1. Key actions as a partnership

The EXAM 4.0 partnership will also provide opportunities for stakeholder engagement, among which:

- European multiplier event
- 3 local multiplier events
- LinkedIn group: EXAM 4.0 community of practice
- EXAM 4.0 newsletter

- EXAM 4.0 social media (#EXAM4point0 hashtag)
- EXAM 4.0 website

ANNEX I – Stakeholder Identification Sheet

NAME OF THE PARTNER

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CONTACT PERSON

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Stakeholder organisation	Contact person at stakeholder	Contact details	Comments

