INFORMATION SOCIETY TECHNOLOGIES (IST) PROGRAMME

Contract for:

Accompanying Measure

Annex 1 - "Description of Work" IST-2001-33526

Project acronym: FlexWork Add-on

Project full title: Demonstrating and promoting the adoption of new ways of FLEXible WORKing among outlying regions and SMEs

Proposal/Contract no.:   IST-2001-33526

Related to other Contract no.: *(to be completed by Commission)*

Date of preparation of Annex: 30 August 2001

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Operative commencement date of contract: *(to be completed by Commission)*

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	EUROPEAN COMMISSION RESEARCH DIRECTORATES GENERAL SHARED COST AM CPF FORMS	EN C 1 FP5AM FOR COMMISSION USE ONLY	

Project Acronym	FlexWork	**Proposal No**	IST-2000-26367

A2.	**Project Summary**

Objectives

To facilitate the practical take-up of new ways of flexible working using technologies from within and outside IST, in outlying or technologically disadvantaged regions with special emphasis on SMEs. To demonstrate to SMEs in these regions how Service Deployment Templates (detailed guidelines and procedures) can enable them to make use of existing technologies and new technologies. To encourage synergy between IST technologies and organisations using the European Regional Development Fund and European Social Fund, by working with EURADA (European association of regional development agencies), ADAPT (European employment network) and Telework organisations. This project is an extension of the existing Flexwork project to the new accession counties of Slovenia, Bulgaria, Hungary and Poland.

Description of the work

FlexWork will build close working partnerships with regional and user bodies including EURADA, ADAPT and its successor EQUAL, and European telework associations, in order to reach SMEs in the regions. It will capture the needs of the SMEs through dialogues and participation in the conferences and workshops of the above bodies. It will also capture advances and trends in the technology and emerging products from IST which support flexible working;

The project will develop Service Deployment Templates, using SMEs in developing regions in Ireland, Portugal and Eastern Europe as usage case studies. It will channel and demonstrate these Service Deployment Templates and the underlying flexible working technology directly to the users by participating in their own conferences, workshops, publications and websites. It will support all levels of flexible working technology, from applications software (e.g. for collaborative working and virtual meetings) to the underlying communications infrastructure, with emphasis on the use of open standards.

The project will raise the awareness among regional development agencies involved in the use of the Regional Development Fund, of new communications infrastructure technologies in which they could invest.

It will feed requirements, issues and comments back to the IST projects.

Milestones and expected results

Channelling progress report release 1 – month 13*

Channelling plan release 2 – month 19

Service Deployment Templates group 2 – month 18

Channelling progress report release 2 – month 24

Final Service Deployment Template specification – month 24

*Months used reference the 24 moth base Flexwork project

2   Project objectives

The goal of FlexWork is to promote the adoption of innovative ways of flexible working, using emerging technologies from within and outside IST, by users in outlying or technologically disadvantaged regions of Europe, with special emphasis on SMEs (Small and Medium Enterprises).

"Innovative ways of flexible working" means the use of a new generation of technologies that enable individuals and companies to work with each other, independently of location and time differences. FlexWork will demonstrate to users how to solve the problems of isolation experienced by many of today's teleworkers and small companies, by the use of new technologies such as collaborative virtual workspaces with fully mobile access.

2.1   Primary objectives

⇒   The **primary objectives** of the flex work add-on project is to extend the existing FlexWork project and its objectives to the accession counties of Slovenia, Bulgaria, Hungry and Poland.

2.2   Critical success indicators

The objectives of this add-on project remain as in the original proposal *with the addition of the following objectives*

▪   To extend the project pilot studies from the original two "type A" regions (Ireland and Portugal) with the addition of a third region of Slovenia and a forth region (Bulgaria) (WP1).

▪   To extend the information channelling activities to the additional regions of Slovenia, Poland, Hungary and Bulgaria (WP4).

In order to achieve these goals the project is incorporating one new partner from the regions of Slovenia, Poland, Hungary and Bulgaria.

2.3   Value Add to the project

This add-on directly supports a key objective of the FlexWork project in targeting accession countries as candidates for the development of flexible working solutions. The addition of the Slovenia and Bulgaria as Use Case sites will enable the project to develop a better understanding of the regional issue that need to be addressed when applying flexible working techniques and solutions. This results from the use case will ensure the maximum impact of the projects work on industry in the accession countries.

There are many similarities between the industrial environment of the targeted technologically disadvantaged regions of the European Union such as the pilot study sites of Southeast Ireland and Portugal and the accession countries of Hungary, Poland, Slovenia and Bulgaria. Preliminary contact with the regional development agencies and the SME representative bodies of these countries have shown strong interest in the applicability of the FlexWork work in these regions and a commitment to participate in FlexWork workshops and training courses. The inclusion of these new regions into the project will maximise the impact that the project's work can have aiding the technical development of these regions to a standard comparable to the rest of Europe. This add on provides the project with a strong local presence capable of customising the FlexWork results and targeting it to key local organisations and interest bodies.

3   Participant list

Partic. Role[1]	Partic. no.	Participant name	Participant short name	Country	Date enter project	Date exit project
C	P01	Waterford Institute of Technology	Waterford	Republic of Ireland	Start	End
P	P02	Portuguese Association for Telework Development	APDT	Portugal	Start	End
P	P03	Danish Technological Institute	DTI	Denmark	Start	End
P	P04	Empirica	Empirica	Germany	Start	End
P	P05	Interaction Design Ltd	IDL	United Kingdom	Start	End
P	P06	Telscom Consulting GmbH	Telscom	Switzerland	Start	End
P	P07	University of Brussels	ULB	Belgium	Start	End
P	P08	A.L.P. PECA	A.L.P. PECA	Slovenia	Start	End
P	P09	Mona	Mona	Hungary	Start	End
P	P10	VirTech Ltd	VirTech Ltd	Bulgaria	Start	End
P	P11	ITTI	ITTI	Poland	Start	End

4   Contribution to programme/key action objectives

4.1 Innovation and quality

FlexWork offers an innovative approach to channelling the emerging technologies and products for flexible working to SMEs in the regions, by developing and distributing Service Deployment Templates which will be immediately useful to many SMEs. The Templates are a vehicle through which FlexWork can promote the use of relevant emerging technologies and products, especially to encourage the take-up of flexible working activities in the developing counties; this will promote integration with the more developed countries. An additional aim of FlexWork is to transfer the innovative results of many IST projects to potential users.

The project builds on a vision of a global networked economy where consumers, workers and enterprises can seamlessly and dynamically come together and interact through a ubiquitous infrastructure that promotes both trust and confidence. FlexWork will stimulate innovation by generating essential synergy within IST, and with the external providers, policymakers and user bodies. FlexWork will build links so that Key Action 2 will benefit from the relevant work in other Key Actions, notably the multimedia, mobile communications and broadband Internet work in Key Action 4, the multimedia technology work in Key Action 3, and technologies for people with special needs in Key Action 1.

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[1]   C = Co-ordinator; P - Principal contractor

Quality will be assured because the outputs of the project will be subject to detailed review by the collaborative network of participants. The project will encourage open interfaces where possible, to avoid proprietary bottlenecks that would prevent interoperability.

4.2 Community added value and contribution to EU policies and social objectives

FlexWork will focus its efforts on Europe-wide bodies and, through them, national bodies, as well as companies who are leading-edge users and providers of flexible working technologies. The project has already received support and agreements to co-operate from EURADA and ADAPT. The project will contribute to EU policies by accelerating the development, integration and adoption of technologies enabling new ways of flexible working. This will not only contribute to the objectives of the Regional Development Fund and the European Social Fund but will also support the conclusions of the Council of Europe meeting held in March 2000 in Lisbon (the eEurope initiative).

New ways of flexible working are essential for sustainable development and social inclusion. Pollution and destruction of the environment can be substantially cut by reducing the amount of business travel, and moving information instead of people. Rural communities can be regenerated as people can work locally, and, conversely, pressure on overcrowded cities can be relieved. Housebound and disabled people can have access to better job opportunities.

The add-on directly supports the key objective of the Europe commission to extend membership to the European community. The application of flexible working methodologies and best practise to these emerging regions of Slovenia, Poland, Hungary and Bulgaria directly supports the European objective of developing a single pan-European economic market with equal opportunity of access across all members states and especially across the emergent states. In the application of flexible working methods it is vital that the key economic players within these regions have an opportunity of entering into dialogue with experts in this field to identify solutions which meet their regional needs.

4.3 Economic development

FlexWork will help Europe to realise its potential as a world leader in the field of flexible working. The project will be a catalyst for matching forward-looking projects, products and services that integrate several technologies in imaginative ways to the commercial needs of the European market.

The new generation of technologies and services fostered by this project provide significant opportunities for improved prosperity and quality of life throughout Europe. Businesses benefit by being able to rapidly assemble skilled project teams independent of location, and to retain trained staff across relocations. The individual worker benefits by having access to more opportunities, less travelling, more time with the family and less stress.

The add-on supports the economic development of the Slovenia, Poland, Hungary and Bulgaria directly through the application of flexible working methods in these regions. This activity will enhance the region efficiency and competitiveness resulting in the regions been better positioned to integrate more fully into the single European economic market. This in turn will have a net benefit for the economic development of the European Union.

4.4 Results and dissemination

The expected results of the project are listed in detail in Section 2 above. The FlexWork participants have excellent connections, and a highly successful track record in the Fourth Framework Programme, in actively promoting and channelling results of this kind to users, policymakers, equipment, network and service providers and standards bodies. To reinforce these connections, the project has entered into

partnership with EURADA[2], the European association of regional development agencies, to channel results to its members, and with ADAPT, the Human Resources Community Initiative. The project will also establish links with the ITU EC-DC initiative[3]. The methods of channelling are detailed in the project workplan Section 9 below.

By adopting an approach where the project works through European agencies, to regional agencies and then to business advisers who will influence SMEs, the project can have an impact on a greater number of SMEs throughout Europe (and especially in the outlying and technologically disadvantaged regions) than if it attempted to create close relationships with SMEs or agencies in a few selected countries.

5   Relations to Programme

This Accompanying Measure project will demonstrate to many companies, especially SMEs in the outlying regions and the technologically disadvantaged regions of Europe, how to adopt emerging technologies for new methods of flexible working. These methods can overcome the limitations of distance, time differences and other constraints of traditional methods of working. They can help SMEs in these regions to compete effectively in global markets on equal terms with companies located in the main population centres. The project focuses on a short to medium term horizon (2 to 5 years).

At the same time FlexWork will help the IST projects and clusters that provide the new applications and technologies for flexible working to understand the issues and requirements of their prospective customers. It will help them to see beyond their immediate disciplines, and to understand how they can integrate their developments with each other in order to fulfil the real needs of the users.

FlexWork will support Key Action 2, linking it closely with the relevant RTD projects and clusters in other Key Actions: e.g. Key Action 4 (mobile, broadband, visualisation technologies, network and service management work); Key Action 3 (multimedia content manipulation, encoding and virtual reality work); and Key Action 1 (work on human interfaces for people with special needs). The project will take into account access to e-commerce facilities by individual flexible workers.

FlexWork will work closely with other relevant European and international support measures and projects. Care will be taken to avoid duplication of effort. At the outset, meetings will be held with each of the other support projects to plan co-operation. Some of these projects can assist FlexWork in capturing requirements and technologies; others could co-operate in disseminating the results.

In addition, the add-on addresses key action IST-2001-VIII.1.6 Enabling RTD co-operation with Newly Associated States. The project directly addresses this through the inclusion of 4 new partners from these new associated regions. The partners will become full partners within the project. The project will directly support the flow of expertise towards the new partners and the partners (old and new) will collectively work to develop flexible working solutions for the new associated states identified above

At the outset, the project will build its community of participation. Channel Managers will be appointed within the project. to focus on disseminating information to users of the technology external

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[2]   A draft co-operation agreement with EURADA is attached as Appendix 1.

[3]   The Electronic Commerce for Developing Countries (EC-DC) project is an activity of the ITU Telecommunication Development Bureau (BDT). EC-DC assists developing countries in the use of electronic commerce by addressing the technology, policies and strategy issues related to e-commerce. It provides a framework for neutral and non-exclusive partnerships with industry thereby creating the environment for cost-effective solutions to the benefit of developing countries. Although electronic commerce and flexible working are separate (but related) activities, their needs for underlying infrastructure have much in common.

to IST (eg SMEs). Managers will also be appointed to work closely with the providers of the new technology, including the IST programme.

The task of the Channel Managers will be to build a close working relationship with decision-makers in influential user bodies external to the IST Programme The target bodies include European and national regional development agencies and IT training networks; European and national alliances of organisations of disabled and elderly persons; telecom and IT user groups; and corporate IT and network managers' associations. Through interactive dialogue with the strategic planners and managers in these sectors, the Channel Managers will understand the issues on which they need guidance.

The co-operation of end users is necessary for the success of the project, since they are ultimately the ones that have to believe in the value of the flexible working tools and technology Experience in previous successful Accompanying Measures has shown that one way to ensure co-operation is to give presentations at the user bodies' own workshops and conferences. Also to place material in the newsletters, journals, trade press and websites of the user bodies. Thus, the users will not be expected to attend special events or read special publications. Experience has shown that key people will co-operate because they have a strong need of the synergy, clarity, sense of direction and practical templates that this project will offer them, in a world where the pace of change is often confusing. Experience has also shown that personal interactivity is essential with senior managers in the external bodies. Very little information flows to or from senior managers via websites or questionnaires (even though these are effective ways of reaching middle managers).

The second group of managers will focus on technology and will build co-operative relations through dialogue with the relevant IST technology projects and clusters, participating in their workshops and concertation activities. They will also build a close working relationship with technology providers, external to the Programme. The target bodies include Assistive Technologies developers; communications and IT industry bodies (such as EURESCOM, ETSI, ITU, TeleManagement Forum, EBU) and industry. Through a combination of desk research and interactive dialogue with these sectors, the Channel Managers will identify key technologies within and outside IST that have to be taken into account. They will also identify the dependencies that these sectors have on the availability of particular technologies.

6   Community added value and contribution to EU policies

Regional development and cohesion, the role of SMEs in this, and the promotion of flexible working methods, are all focus policies of the EU, recently confirmed again by the *eEurope* strategy and action plan (see section 6.1.7 below). The role of new information and communication technologies is critical in this process, and the FlexWork project is confident of being able to play a core role in supporting these on-going developments. In order to do this, FlexWork will be building upon existing knowledge and work, of which a substantial amount already exists, and linking closely with key players (both within and external to the Commission) over the next two to three years. This existing state of the art, and FlexWork's participation in and relation to it, are described in the following.

6.1   State of the art

There are a large number of programmes and initiatives in the area covered by FlexWork providing a substantial platform of experience and on-going developments, many of which FlexWork participants have been involved in, as outlined below.

6.1.1   ADAPT, EMPLOYMENT and EQUAL

ADAPT is the European Social Fund Initiative designed to help the workforce adapt to industrial change, and to promote growth, employment and competitiveness in the European Union's SMEs. More than half of the 4,000 innovative projects, selected by national and regional authorities in the

Member States, focus on the adaptation of the workforce and companies to the Information Society (priority Building the Information Society - ADAPT BIS). The ADAPT projects have either focused on new ways of implementing lifelong learning strategies or helping companies to set up continuous training schemes. Regional and sectoral observatories in ADAPT have also been developing approaches to help anticipate future business and training needs. The changes brought about by new information and communication technologies encourage SMEs to introduce new forms of work organisation, telework and e-commerce or to compete alongside larger companies via networking. Many ADAPT projects have also promoted "learning regions". ADAPT covered the period 1994 – 1999 but many projects are still producing their final results, tools and reports during 2000 and 2001. Member States and the European Commission will identify, highlight and disseminate these positive outcomes and decide on how they can best be used to influence current policies and practice at European, national and regional levels.

The EMPLOYMENT Initiative, functioning in a similar way to ADAPT, did not prioritise Information Society issues but its focus on specific target groups (young people, women, the disabled, and people with special difficulties) makes it very valuable for EU policy and the *eEurope* Initiative, and thus relevant to FlexWork. The initiative delivered a number of useful approaches, tools and good practices on telework, multimedia, business creation, etc.

The new Human Resources initiative EQUAL, kicking off in 2000, will start from the strategic lessons of ADAPT and EMPLOYMENT at policy and strategy level, as well as nationally. The clear link between EQUAL and the European Employment Strategy is also reflected in its themes, especially in the adaptability pillar: life long learning strategies, adaptation of work organisation and the use of ICTs. It will also take into account the priorities for the new programming period of the European Social Fund, above all the support for innovation and adaptation in work organisation, the development of entrepreneurship and equal opportunities to access the labour market.[4]

FlexWork has already received commitment for close co-operation from the ADAPT Programme Co-ordinator (Jos Janssens) who is also likely to have a future role in EQUAL. Jos Janssens will be working with FlexWork to create and maintain a strong interface with the new Programme while drawing upon the experiences of the old.

6.1.2 Article 10 (European Regional Development Fund -- ERDF)

In terms of inter-regional cohesion in Europe, recent statistics indicate that the least-favoured regions (LFRs) are faced by a "technology gap" twice as great as the differences measured by income per head. In line with the priorities of Article 10 approved for the 1995-1999 period, innovative measures aimed at developing new ways of introducing innovation in the regional development agenda of the LFRs of the European Union have been introduced. These include "increasing awareness in SMEs from LFRs about research and technological development activities" and, more generally, about the regional economic implications of technological change, as suggested by the Regional Commission of the European Parliament.

One of the priority areas for pilot actions under Article 10 of the ERDF and Article 6 of the ESF for the 1995-1999 period was the translation of the Information Society concept into real life in the regions through demonstration of innovative applications and services, i.e. Regional Information Society Initiatives (RISI). RISI had two elements:

a) RISI 1 - the development of a regional partnership in the elaboration of a regional Information Society strategy and action plan. RISI 1 drew on the lessons of its pre-pilot experience, launched in 1995, IRISI (Inter-Regional Information Society Initiative) in six test regions.[5] The overall aim was

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4   Links to ADAPT, EMPLOYMENT and EQUAL can be made from
         http://europa.eu.int/comm/employment_social/equal/index_en.htm
5   more detailed information about the IRISI pre-pilot actions may be obtained at the Web site
         http://spavalda.polito.it/

to enable regional partnerships to make better use of existing resources for developing the Information Society.[6]

b) RISI 2 - preparation and launch of pluri-regional pilot applications for demonstrating best practice and developing know-how in the regional deployment of the Information Society. RISI 2 projects focused their scope on the LFRs. Rather than identifying specific basic services and generic applications, these projects demonstrated innovative uses of validated information and communication technologies in working and trading in LFRs. The focus was on the adaptation of existing validated technologies, rather than on new ones.

Plans are currently being laid for innovative measures under the ERDF for the period 2000 to 2006 in which assistance will be given under Objectives 1 and 2 of the Structural Fund. One of the three measures included is for *e-europeRegio*, the Information Society serving regional development, linked closely to the *eEurope* strategy and objectives launched in Lisbon in March 2000 (see section 6.1.7 below).

FlexWork participant Jeremy Millard has worked as advisor to several RISI projects and will be able to harness its experiences within the context of the Structural Funds regime for the new millennium presently being put in place.

6.1.3 LEADER

LEADER is the French anagram for links between actions for the development of the rural economy. The Community's participation was set at 1,755 million ECU of which 900 million ECU are for the regions of Objective 1 (lagging behind in development). LEADER I was established to bring the operation of the Structural Funds into closer collaboration with the Commission's RTD initiatives, such as ORA in 1990 and 1991. LEADER II applied for the duration of the planning period of the Structural Funds from 1994 to 1999.

LEADER covers geographical areas of limited size with a strong local identity. It is based on the active involvement of the local people, firms, associations and authorities. It serves as an incentive for development strategies adapted to the area's characteristics using an integrated, multi-sector approach. Among the eight key points for rural territories, four of them have relevance for flexible and teleworking: activities and jobs; migrations and social and vocational integration; technological developments; competitiveness and access to markets. Several teleworking projects have started under the "rural innovation programmes" (measure B), the "transnational co-operation" (measure C), as well as the European network for rural development (measure D).

Rural development is increasingly understood as sustainable integrated development to include social, cultural, economic and environmental dimensions in a context of geographic diversity. Issues about new ways of working with ICTs have been tackled by many project holders within the LEADER framework, with some success and many failures. During the LEADER seminar entitled "new technologies and changes in rural employment" held in June 1998 in the Outer Hebrides (Scotland), seven case studies were investigated and four models of best practice identified:

i)   ICTs in traditional activities, e.g. marketing local crafts, tourism, agricultural produce

ii)   ICTs for job opportunities, e.g. call centres, teleworking

iii)   ICTs in the delivery of services like health, education, public administration, etc.

iv)   ICTs and networking, when used as a internal or external communication tool.

A good example of a successful LEADER-supported project is the Outer Hebrides ICT Advisory Service which develops and markets the services of local teleworkers and has created over 400 full-

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[6]   more detailed information about the RISI 1 pilot actions may be obtained at the Web Site http://www.risi.lu.

time permanent jobs on the islands since 1994. This initiative won a European Telework Award in 1999 (see section 6.1.5 below).

Further efforts are now being put forward to bring ICTs closer to any activity or service bringing benefits to local people in rural areas so that the innovative aspects of such projects will continue to be supported by the next rural development initiative LEADER+ (2000-2006).[7]

FlexWork participant Jeremy Millard is a LEADER Information Society Task Force member and, in this capacity, helped organise and run the June 1998 seminar. As a result of this, LEADER published a dossier ("Information technologies and rural development) in 2000 prepared by Jeremy Millard.

6.1.4 Telematics Applications Programme (TAP)

Building upon ORA (Opportunities for Rural Areas, 1992-94) and a large number of telework related initiatives in the early 1990s (for example the Telework Stimulation Actions between 1994-96), the Fourth Framework Programme (1994 to 1998) contributed a large amount of experience and activity in the area of new ways of working coupled with regional development issues, many of which were focused on SMEs. The most significant of these was the Telematics for Urban and Rural Areas (TURA) sector of the TAP which developed new applied technologies in four domains: urban development, commerce, regional development, and employment and training.[8] Some key projects are highlighted in the following.

The urban domain addressed employment, commercial, cultural and governance aspects of urban life and how telematics can support these. The key project here was European Digital Cities (EDC), part of the EuroCities and TeleCities network, which co-ordinated and supported all projects providing telematics services for urban areas and provided an open forum for the exchange of information and expertise.

The commerce domain included projects promoting telematics solutions for business and commercial processes, especially among SMEs, many of which focused on flexible working applications. For example, the TEXATWORK project provided new organisational models and teleworking tools for the textile and clothing industry and its related distribution activities.

The regional development domain supported activities with broad geographical coverage or which were concerned with remote or disadvantaged regions. For example, the TELE-INSULA project developed a European Island service network supporting applications, services and infrastructures in the health, tourism and education sectors. The TeleRegions network launched the TELEREGIONS-SUN project which developed a common inter-regional telematics platform integrating the functions of public authorities, users (including SMEs) and other actors. TURA also supported ERNACT (European Regions Network for the Application of Communications Technology), a network of European regions founded in 1991, through the IRDSS project providing Integrated Regional Development Support Systems.

Finally, the employment and training domain focused on the need for both individual and companies (particularly SMEs) to acquire new skills and competencies in the Information Society. For example, CAFE-MONDIAL successfully addressed all these issues by providing comprehensive telematics services for training, e-commerce and human interaction, and which itself created over 2000 permanent full time jobs.

Some of TURA's activities are being continued in the on-going Integrated Applications for Digital Sites (IADS) Programme.

One of FlexWork's participants (Jeremy Millard) has worked closely with TURA and continues to do so with IADS (for example he chaired sessions at an autumn 1999 IADS Concertation Meeting on

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7   More information on the rural development initiative and its operational projects is available in six languages from the Rural Europe Web site http://www.rural-europe.aeidl.be

8   See http://www.echo.lu/telematics

users and on regional development). He managed the TeleWork Europa (TWEURO) support action which successfully supported TURA and IADS, and authored the TURA best practice dossier published at the conclusion of the programme in 1999. He had earlier authored two ORA best practice dossiers in 1995/96 entitled "Promoting local and regional development using telematics" and "Telematics and urban development". Jeremy Millard will also be project manager of the IST Key Action I accompanying measure, PRISMA, commencing in autumn 2000, which is developing best practice models, future visions and scenarios for citizens services, particularly in a regional context. FlexWork thus has at its disposal considerable expertise and contacts from the Fourth Framework and now also the Fifth Framework Programme.

6.1.5 ACTS

Also part of the Fourth Framework Programme, ACTS concentrated more upon basic research but also supported a number of horizontal actions which have direct relevance for FlexWork. The FAIR project provided socio-economic support analysis, for example studies on market change and growth, employment and regional development. European Telework Development (ETD) was a successful outreach and dissemination action which helped develop an on-going European Telework Agenda (for example, annual Telework Assemblies, European Telework Week, the European Telework Awards, etc.). ACTSLINE supported the marketing of ACTS results, developing customised packages of information for each group of actors.

Several FlexWork participants have been involved in relevant ACTS work. For example, Michael Griffith and William Donnelly were centrally involved in ACTSLINE and prepared the book "Flexible working, new network technologies" (1999) drawing upon ACTS results. Jeremy Millard managed the ETD project and was a prime mover in many ACTS telework activities. He also participates in the IST Key Action II EMERGENCE project with responsibility for developing a regional development toolkit in 2002. Werner Korte is participating in the IST Key Action II project STAR providing socio-economic trends assessment for the digital revolution, and both he and Jeremy Millard are involved in FAMILIES examining the interactions between families, work and IST; both projects are dealing with aspects of flexible and teleworking. Again, therefore, FlexWork has at its disposal considerable relevant expertise and contacts from the Fourth Framework and now also the Fifth Framework Programme.

6.1.6 ESPRIT

ESPRIT was the Information Technology Programme in the Fourth Framework Programme and consisted of eight domains. These included Technologies for Business Processes (TBP) which worked on the principle that it is not possible to introduce, for example, workflow system technologies into businesses without also looking at their overall organisational structures, processes and goals. ESPRIT also ran a number of telework projects, such as COWORK, which developed concurrent project development IT tools for SMEs, and LIQUIT which developed IT tools for resource management in telework teams.

Again, FlexWork participants have key experience of the ESPRIT Programme. Werner Korte managed the ECaTT (Electronic Commerce and Telework Trends) project which benchmarked progress in new ways of working and electronic commerce across Europe on the basis of a large number of detailed case studies as well as a comprehensive scientific take-up survey in ten of the EU Member States. ECaTT's predecessor, TELDET, also led by Werner Korte, undertook a ground-breaking telework survey in 1994.

6.1.7 Other relevant initiatives

There are many other sources of experience and vehicles for co-operation and dissemination, including the following:

European level regional agencies

FlexWork has approached many of the main agencies:

- **EURADA**: the European Association of Development Agencies (EURADA) has already committed to working closely with FlexWork.

- **CEMR**: the Council of European Municipalities and Regions, and **ELANET**: a specialised ICT network operating as an Executive Committee of CEMR and part of the European Local Authorities Telematic Network Initiative. FlexWork has made initial contact.

- **Innovating Regions in Europe** (RIS-RITTS Network): develops regional innovation strategies with operational action plans containing many new business-related innovation projects. FlexWork has made initial contact.

- **ERIS @**, the European Regional Information Society Association, is currently discussing with many of the other European networks how their work can best be co-ordinated in order to create beneficial synergies.

- **EuroCities, TeleCities, TeleRegions and ERNACT** (see section 6.1.4 above): FlexWork already has good contacts and on-going links with these important networks.

- **The European Telework Development network**, linking telework and flexible working associations in each EU Member State, plus in most of Central and Eastern Europe. The network is supported by the European Telework Online website (http://www.eto.co.uk), the world's most comprehensive and visited of its type. FlexWork members contributed significantly to ETO's development and services and will continue to be involved in the future.

eEurope Initiative

This new EU initiative will be a core strategy for European Information Society developments over the next few years. Launched at the Lisbon Summit in March 2000 and followed up by an action plan in June 2000, the "eEurope – an Information Society for all initiative" has three high levels aims: ensuring all European citizens, users and businesses get online; creating a digitally literate Europe; and ensuring that the whole process is socially and regionally inclusive.

Journals

FlexWork participants regularly contribute to a large number of relevant journal and magazines, including:

- "Flexible Working" a UK-based but European wide journal with a comprehensive coverage of telework, human resource issues and new technology, especially in relation to SMEs

- the "European Journal of Teleworking", the oldest European journal of its type.

- the "Teleworker", published by the Teleworking Association, UK, but widely read throughout Europe and the rest of the world.

6.2   Value to be added by FlexWork

As can be seen in the above, FlexWork participants have been deeply involved in many of the key European as well as national initiatives directly relevant to the work of the project. This provides FlexWork with a comprehensive understanding of the state of the art as well as developed contact networks and on-going and close relationships with many of the main actors. The importance of such personal relationships in the work of FlexWork cannot be over emphasised, as this will enable rapid and relevant co-operation to take place which is both effective and wide-ranging.

FlexWork will undertake its work analysing case studies, preparing Service Development Templates (SDTs) and channelling these and other tools to users, SMEs and regions, through, and with the help of, many of the above initiatives and networks. Precisely how this is done is described in detail in the Work Plan in section 9 and in the success criteria in Section 2. FlexWork's value added in each case will:

- equip regional agencies with the knowledge, materials and tools required to promote regional policy for ongoing, sustainable SME support in the electronic marketplace.

- ensure that a consolidated approach for rapid uptake of flexible working opportunities by SMEs at a regional level is made possible by delivering information and support on new approaches underpinned by business cases showing success.

- aid removal of 'regional' obstacles by equipping all regions with the essential knowledge, materials and tools for effective flexible working by SMEs.

- equip regional agencies in active local partnership with SMEs and those providing knowledge skills and training (e.g. they will be facilitated in moving towards flexible working in line with IST developments).

- ensure SMEs and their supporting agencies receive 'packaged' knowledge and materials to be used in business planning for new ways of working.

- by using the 'packages' the project creates, ensure a common basic level of competence in each region where SMEs and their counselling and training partners can explore and benefit from flexible working.

- base its delivered content on successful planning tools, and the most recent IST products to ensure a 'levelling' of awareness, knowledge and competence in regions.

- serve as a model for improving regional SME competitiveness through the use of flexible working within the context of the IST Programme throughout the EU.

- contribute to regional decision makers' and regional actors' awareness and understanding of flexible working and its economic and social implications, including the risks as well as the opportunities it may offer, and ensure that cohesion considerations are not overlooked in the race towards the Information Society in Europe.

- given that its participants are active in a number of key IST networks, working groups and associations, ensure the promotion of flexible working methods to SMEs as part of the larger development of regional support.

- the Handbook and Service Deployment Templates are distinguished from books currently available on the market, by being

  - tailored to meet the needs of SMEs and in peripheral regions

  - aimed at the advisors and trade associations of SMEs in selected business sectors

  - broad enough to cover all main styles of flexible working

  - backed by live demonstrations

  - promoted through workshops and training seminars

There are two key aspects of FlexWork's strategic value-added. The first relates to the need for Regional Development Agencies (RDAs) SMEs and their advisors to respond to the opportunities of flexible working and avoid its threats. The second relates to the need of SMEs and citizens to determine

their new relationships with other businesses, and with public and private service providers in light of the implications of flexible working and the Information Society in general.

European social, economic and regional cohesion will benefit from the FlexWork project, due to the new employment and work enhancing opportunities that it will enable for remote, rural and other disadvantaged clusters of SMEs and groups of citizens.

7   Contribution to Community social objectives.

7.1   Employment and labour market policy

Employment remains the number one priority for Europe as unemployment is still too high at about 10% of the European labour force and the quality of many working experiences is still too poor and insecure. The introduction of flexible working and information society technologies into European companies, organisations and administrations over the past ten years, especially in instances where the focus has been only on cost-cutting and short term efficiency, must take some of the blame for this situation. On the other hand, ISTs are the main motor for economic growth, as well as for improvements in competitiveness and productivity across most sectors, with the industry itself providing about 5% of GDP and 4 million jobs.

FlexWork's contribution to this critical area will be significant through its development of Service Deployment Templates which are designed to facilitate the introduction of flexible working to maximise employment in both quantitative and qualitative terms.

Of great importance to FlexWork in this context will be the management, competence and skills development aspects, especially in SMEs. The type of skills and competencies needed in promoting flexible working and management are very different from those traditionally used in SMEs. These are changing from fixed, life-long skills directed purely at bureaucratic, mechanical and technical tasks, to include flexible, changing skills with a strong component of interpersonal, customer-care and self-organising skills with much more individual responsibility and delegated management styles and structures.

7.2   Growth and innovation for SMEs

FlexWork will support the European policy aimed at the development, growth and innovation of small and medium businesses, which constitute over 95% of EU companies and employ two thirds of the private sector workforce, and in which the take-up of flexible working and e-commerce is not fast enough. Although there is an important segment of highly flexible and innovative SMEs in Europe, most of which are relatively new, in high-tech or business service sectors and which have been built around the new technology, the vast majority of SMEs are still in traditional sectors and still rely on traditional working methods and management structures. The latter type of SMEs form the bedrock of most disadvantaged regions, so that it is in these areas that the greatest needs and challenges arise, and where FlexWork will focus its efforts.

The introduction of flexible work and ISTs in itself is a factor of change in any company: job content, work organisation, logistics and management and geographical scope will change. In the tools and approaches it adopts, FlexWork will highlight the beneficial effects for SMEs in disadvantaged areas, which can compete with larger businesses via co-operative support and the creation of virtual companies.

7.3   Local and regional development

This is an area which will be given specific focus by FlexWork through its focus on regional development Service Deployment Templates and strategies. Although common and standardised approaches to designing and implementing flexible working practices and technologies can be applied across many regions and cultures (indeed this is one important goal of European programmes and trans-European projects), it is important that specific social groups, specific types of companies and specific localities can individualise the methods adopted and the systems developed in practice.

Generic/European approaches together with locally-tailored solutions is the goal of FlexWork, will also be examining a number of generic factors which include looking at the effects of:

- different legal and regulatory frameworks, including local political configurations and relationships, obligations and constraints placed on the social partners, general social and ethical aspects, subsidiarity principles, etc.

- the cultural environment, which captures the less formal regional and national characteristics as well as demographic and national/regional political aspects

Taking account of these differences is extremely important for shaping the way people and companies work in local communities, especially given the trend which sees the Information Society heralding a strengthening, rather than a diminishing, of regional difference and regional power. FlexWork's Service Deployment Templates and demonstrations will comprehensively illustrate the importance and role of the regional and local, and the critical part played by flexible working practices and technologies in this.

7.4 Social integration, inclusion and equality

The dangers of a two (or three or four) tier Information Society in which those most competent in the use of IST, and with more ready access to them, reap most of the benefits, whilst those without these advantages become more marginalised and excluded, are not more easily resolved simply by being widely recognised. Greater understanding of how IST-supported flexible work is to be introduced and exploited, and of the organisational, cultural and socio-economic contexts in which this use takes place, is necessary. Without this it will not be possible to manipulate the many parameters involved and thereby maximise social integration, inclusion and equality without sacrificing economic growth, employment and competitiveness.

Through its focus of attention onto SMEs in disadvantaged regions, FlexWork will be able to make contributions to an understanding of flexible working and thus will be in a better position to predict, support or determine desirable outcomes.

7.5 Enhancing the environment

Through its support for flexible working methods and technologies, FlexWork will be able to make important contributions to sustainable development policies. Telework, flexible working and e-commerce encourage de-materialisation, a better use of resources, less use of and/or more effective transport and logistics infrastructures, and a better matching of supply and demand through reduced communication and co-ordination costs. FlexWork's strategy and toolbox development will highlight and promote such benefits, particularly for SMEs in the more traditional economic sectors and with more traditional management and working regimes where the benefits to be gained are greatest.

7.6 An Information Society for all

FlexWork will support eEurope, the European Commission's political initiative for the Special European Council of Lisbon, March 2000. This initiative aims at bringing every citizen, business and administration into the digital age and online; creating a digitally literate Europe, supported by an entrepreneurial culture, ready to finance and develop new ideas; ensuring the whole process is socially inclusive, builds consumer trust and strengthens social cohesion. FlexWork will support eEurope through its tools for strategy development, best practice, benchmarking and demonstrations by, inter alia:

- underpinning the campaign to help SMEs go digital and accelerating the adoption of flexible working and e-commerce by the transfer of know-how developing practical and relevant tool kits

- developing and disseminating best practice through tools and benchmarking techniques in flexible working, specifically aimed at remote or disadvantaged regions and SMEs which have fewer resources to draw upon and which often face greater difficulties in adopting flexible working patterns and technologies than larger companies in core regions

- promoting regional cohesion by specifically supporting areas and regions at a disadvantage because of locational constraints, structural problems or a weak resource base.

- promoting social inclusion by helping to empower marginalised groups, such as people with disabilities, ethnic minorities, economic migrants, older people, the unemployed, the unskilled and semi-skilled and women returners

7.7 Ethical requirements

FlexWork is very aware of the ethical issues surrounding its work. Many such issues are potentially involved, for example, much of the close work necessary with SMEs and regions will often throw up issues of IPR, security and privacy and also probably of market confidentiality. These issues need to be respected and conceded, so that trust can be built up between all the parties involved, and this will not always be easy and sometimes not possible. In the latter case, FlexWork will of course respect participants' interests. Overall, however, and although these issues will constitute a challenge to the work of FlexWork, we are confident that the project will successfully negotiate most obstacles because of the participants' combined knowledge, contacts and good relations with potential participants, plus its recognition of the importance of the issues and its commitment to focusing and resolving them to the benefit of all concerned.

8 Economic development and S&T prospects

The project builds on a vision of a global networked economy where consumers, workers and enterprises can seamlessly and dynamically come together and interact through a ubiquitous infrastructure that promotes both trust and confidence. FlexWork will stimulate innovation by generating essential synergy within IST, and with the external providers, policymakers and user bodies. The Service Deployment Templates will enable the creation of a clear vision of the next five years or so, helping participants to grasp new opportunities early, as enterprises, workers and consumers world-wide are awakening to the opportunities of the digital economy of eWork and eCommerce.

With the scarcity of skilled resources particularly in information technology related sectors and availability of vast resources in less developed parts of Europe, flexible working not only provides the European Union with skilled human resources, but also provides a platform for social, technological and economical integration of outlying and technologically disadvantaged regions (including newly associated states) to achieve a harmonised Europe in all aspects.

Key objectives of FlexWork are

⇒ to facilitate the practical adoption of new ways of flexible working using emerging technologies in outlying or technologically disadvantaged regions, with special emphasis on SMEs;

⇒ to demonstrate to SMEs in these regions how Service Deployment Templates can be used to enable them to make use of existing technologies and emerging technologies to gain the benefits of flexible working (Service Deployment Templates are detailed guidelines and procedures for the deployment of new ways of flexible working);

⇒ to encourage synergy between IST technologies and organisations using the European Regional Development Fund and European Social Fund, by working with EURADA[9] (European association of regional development agencies), ADAPT[10] (European employment network) and Telework organisations;

⇒ to put IST projects and clusters in touch with the market requirements for flexible working technologies in these regions;

⇒ to generate synergy between relevant IST projects, clusters and take-up actions cross-Programme.

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[9]   EURADA has already committed to supporting this project with dissemination and workshop activities amongst its members.
[10]   ADAPT has already committed to supporting this project.

Dissemination is aimed at:

- strategic decision-makers among a number of sectors external to the Programme: regional development agencies, user organisations, policymakers, regulators and research funding bodies;

- the IST community.

Methods of dissemination include:

a) presentations to senior management of influential bodies;

b) strategic management briefing documents distributed to various sectors;

c) website, including downloadable reports;

d) presentations and seminars at EURADA meetings;

e) presentations at other major industry and user conferences related to the target regions, and IST conferences and workshops;

f) demonstrations of the Service Deployment Templates, and supporting IST technology, at major industry and user conferences related to the target regions, and IST conferences and workshops;

g) articles placed in the trade press and journals, and in the journals of organisations such as EURADA

h) publishing a book summarising the results of the project;

i) working closely with major events, such as Telework 2000, to create an annual distributed workshop/seminar event to demonstrate flexible working and the strategic tools. FlexWork has received a very positive expression of interest in co-operation of this kind from the organisers of Telework 2000.

The Channel Managers have a key role in dissemination. Early in the project the Channel Managers will establish key contacts in user sectors as well as in "multiplier" organisations (e.g. regional development agencies, industry associations, social partners) for initiation of interactive dialogue concerning channelling actions. A detailed channelling plan will be developed specifying the target audiences and groups to be approached, the means to be employed to reach these and the types of offers to be developed.

The Channel Managers will carry out a 'push-pull' process of marketing the results. The initial 'push' towards the market occurs when they engage strategic planners in their target sectors in dialogue about the needs and issues in flexible working. This leads to a 'pull' from the target sectors, who wish to receive answers to the issues that they raised.

Channel Managers will use the Service Deployment Templates and demonstrations produced in WP3 and develop strategies for channelling to the selected sectors and target groups. Target audiences for the various channelling activities will be regional development agencies (such as EURADA), user groups and industry outside the IST Programme and within it (including those contacted in the previous workpackages and others), "multiplier" organisations, such as industry associations, and), user organisations (EDF, EuroLink Age, etc), teleworking associations. The latter are of crucial importance since they provide the interface to the vast number of their members.

In addition, media partnerships will be sought and established with well known and established business and technology magazines (e.g. Capital in Germany, Byte, Economist etc.) as far as possible to reach the relevant readership in European industry including decision makers and other types of people in industry of importance to FlexWork. The services of an expert press agency will be employed in order to place articles in a large number of international and national magazines and professional journals.

A FlexWork library of management briefings, articles, figures, illustrations, conference presentations etc. will be developed and provided via the FlexWork web site.

The channelling plans will be refined in each active year (iterative) to ensure a regular updating and incorporation of new strategic tools for offer to the above target audiences. This project will work closely with relevant take-up actions in IST.

The expected strategic impact is as follows.

- User organisations in outlying and technologically disadvantaged regions will gain a vision of advantageous new methods of flexible working; the vision promoted by FlexWork will stimulate their interest in early adoption of these methods;

- The relevant providers of technology will gain ideas from the use of the Service Deployment Templates, as to how they can integrate and exploit the technologies emerging from the IST Programme and elsewhere, to create exciting new products and services, and how to adapt them to different user requirements and needs;

- The participants in IST projects will be helped to see beyond their immediate disciplines, and understand how to integrate the technologies to exploit the above opportunities;

- The IST technology partners will be put in closer touch with the provider and user sectors, and this is likely to generate exploitation initiatives;

- Public policymakers, regulators and research funding bodies will gain a clearer picture of how user patterns and the underlying services and technologies will evolve in the medium term future.

9   Workplan

9.1   General description

Detailed information on the workplan is given in the following sections. The workplan in outline is as follows.

1. Identify the key external user bodies (including national telework associations), regional development agencies, research funding and planning bodies, service, network and equipment providers and related bodies. (WP4)

2. Identify key external user bodies in the new Usage Case Study region(s).

3. Appoint channel managers within the project, who are well connected with these external sectors and with the projects and clusters. The channel managers will explain the value added by this project and establish close working relationships. (WP4, in collaboration with WPs 1 and 2))

4. Define the type of Service Deployment Templates needed by the target SMEs in the test regions: i.e. their business sectors(s), the style of flexible working which is suitable (e.g. home-base telework, or nomadic mobile), the multiplier organisations that will co-operate etc (WP1)

5. Test the application of the Service Deployment Templates with SMEs (WP1)

6. Use the results of these tests to refine the Service Deployment templates and executive briefing handbook (WP3 in collaboration with WP1 and WP2).

7. Channel the project's results (including SDTs), and the related achievements of IST projects, to the external sectors and the IST community by means of: (WP4)

   a)   presentations to senior management of influential bodies;

   b)   strategic executive briefing documents distributed to various sectors;

   c)   website, including downloadable reports;

   d)   presentations and seminars at EURADA and ADAPT - EQUAL meetings;

d)   presentations at other major industry and user conferences related to the target regions, and IST conferences and workshops;

e)   demonstrations of the Service Deployment Templates, and supporting IST technology, at major industry and user conferences related to the target regions, and IST conferences and workshops;

e)   articles and news items placed in the trade press and journals, and in the journals of organisations such as EURADA

f)   publishing a book summarising the results of the project;

g)   working closely with major events, such as Telework 2000, to create an annual distributed workshop/seminar event to demonstrate flexible working and the strategic tools (eg SDTs). FlexWork has received a very positive expression of interest in co-operation of this kind from the organisers of Telework 2000.

Service Deployment Templates

The Service Deployment Templates will consist of detailed decision support documents for the implementation of flexible work / telework. They will provide SMEs with a phased model of all relevant steps and tasks - with checklists, tools, concepts (e.g. on security issues), examples of how other SMEs have proceeded successfully, and cost-benefit analysis tools helping them to estimate beforehand whether flexible work / telework would be cost-effective. They will also provide assistance with training. The Templates will be geared to the SME market which needs a free service offered via website and CD-ROM, so they can obtain and use the Templates in a "Do It Yourself" way (meeting the need for a low effort, low cost approach within the SME).

The Templates will take into account new technology as well as other drivers like labour market change, etc., in order to map beneficial requirements to new technology opportunities.

Co-operation with EURADA

The project is using EURADA as a primary channel, since it has close links with Regional Development Agencies throughout Europe, including the accession countries. A co-operation agreement is given in

Workpackage list

Work-package No	Workpackage title	Lead contractor	Person-months[11] Additional for add on	Start month	End month	Deliverable No
0	Project management	Waterford	3	11*	24	003 - 003
1	Usage Case Studies	DTI	18	11	24	102 -103
2	Technology capture	Waterford	0	11	24	FlexWork only
3	Service deployment template & demonstrations creation	IDL	0	11	24	FlexWork Only
4	Channelling	Empirica	24	11	24	402 - 403
	TOTAL		45			

*Assumes the Add-on contract starts in month 11 of the FlexWork project

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[11] The total number of person-months allocated to each workpackage.

9.1.1 Map between major milestones and measurable success factors

The following table provides a mapping between the major milestones for the project and the measurable success factors associated with the realisation of these milestones. It also provides details of the important delivery dates and the activities contributing to the realisation of the milestone.

These success factors show the success of critical stages of the project. The overall success of the project over its lifespan will be measured by the Critical Success Indicators given in Section 2.3

Milestone	Relevant Delivery Date and associated Deliverables	Activities contributing to Milestone	Success factor
Development and Release of Customised Service Deployment Templates for industry sectors (based on the results of the usage case studies)	**Month 12** Results of Tests of Service Deployment templates Version 1 (D102)	• In depth field trials of industry representative SMEs in each of the nominated regions (5 per region) (WP2)	The establishment of in-depth field trials in the regions
	Month 18 Service Deployment Template group 2 (10 SDTs) and database update (other cases) with demonstration (D305)	• 12 workshops testing SDTs in trial regions (WP4) • Production of the state of the art trends in technology reports and presentations (WP2)	Publication of D102 and D307
	Month 23 Report on decision support resource usage(D306)		Results of the in-depth questionnaires of regional SMEs (WP1)
	Month 24 Final Service Deployment Template specification (D307)		
	Month 17 Trends in Technology Reports and Presentations (D201, D202, D203, D204)		

Milestone	Relevant Delivery Date and associated Deliverables	Activities contributing to Milestone	Success factor
Ensure the adoption of new ways of working and best practise in the wider peripheral areas of the EU.	**Month 13** Channelling Progress Report D402 **Month 5 – Month 17** Trends in Technology Reports and Presentations (D201, D202, D203, D204)	• Workshops training in SDTs (all regions) (WP1) • Dissemination of results through key European conferences (WP4) • Operation of joint workshops (FlexWork/Chamber of Commerce) at regional industry sponsored conference in the key regions (WP2/WP4) • Dissemination of results through journals and FlexWork website (WP4)	Delivery of publications products Results from the questionnaires carried out in at least 10 regions and at workshops. Endorsement from the regional multipliers such as regional development Authorities and Chamber of Commerce) in at least 10 regions

Workpackage descriptions

9.1.2 Workpackage number : 0   Project Management

Start date or starting event:	Start of project
Participant number:	Waterford
Person-months per participant:	3

Objectives
- Successful overall direction and co-ordination of the project
- Control of budget
- Responsiveness to the Commission including timely progress reporting
- Ensure quality and timeliness of all deliverables and outputs of the project
- Ensure that the project meets its objectives and carries out its workplan efficiently
- Monitor the success of the project using metrics agreed with the Commission

Description of work

There will be two levels of management: the project management committee, which will have overall responsibility for the success of the project, and the project technical committee which will manage the day to day work of the project.

The project management committee will consist of the project co-ordinator and the workpackage leaders. It will be responsible for the overall control and success of the project, and for resolving any issues or problems that cannot be resolved by the project plenary committee.

The project technical committee, consisting of the project co-ordinator, the workpackage leaders and one representative from each of the project participants, will be responsible for the day to day co-ordination of all tasks and activities. This committee will meet frequently by audio conference, with a physical meeting about every three months. It will provide the Commission with technical, administrative and financial information about the progress of the project to ensure that the project objectives are accomplished in time and within budget.

The workpackage leaders will be responsible for these items within their respective workpackages.

A detailed project plan will be created at the outset, identifying every key action, milestone and product. It will be distributed to all participants and updated monthly. Progress tracking sheets will be maintained by each workpackage leader of actions and outputs. Minor problems will be dealt with by workpackage leaders. 'Red' issues, which involve major slippage or problems, will be resolved by the project management committee.

Quality control procedures will ensure that all outputs meet a well defined need or use, satisfy users' expectations, comply with applicable standards and are available at reasonable cost.

Assessment and evaluation A suitable evaluator will be identified who will carry out a review before the end of year 1, and again before the end of year 2, of the project's performance against the Project objectives listed in Section 2 . The conclusions of this review will be included in the annual Project Review Reports to the Commission.

Deliverables & other outputs

- Project Control Reports to the Project Officer at the Commission – every 3 months.
  Project Review Reports at times requested by the Commission, e.g. annually.
  Participant responsible: Waterford with technical input compiled by Waterford.

D002 Project Final **Report** –month 24
Participant responsible: Waterford

D003 **Project presentation**
Participant responsible: Waterford

Total person-months for project financial and technical management, including preparation of the above reports and deliverables: 12.

Milestones and expected result

As deliverables above.

Participant roles

Waterford - Project management and administration; technical management

9.1.3 Workpackage number : 1   Usage Case Studies

Start date or starting event:	Start of project					
Participant number:	Waterford	APDT	DTI	Empirica	Telscom	ULB
Person-months per participant:			2			
		A.L.P. PECA	MONA	VirTech	ITTI	
		6	2	6	2	

Objectives

To test the Service Deployment Templates with SMEs and their business advisors in developing regions of Portugal, South East Ireland and one of the new accession countries, and to feed back the results so that WP3 can **improve** the Service Deployment Templates.

The set of objectives will be extended to cover a new case study region of Slovenia and Bulgaria. Manmonths are allocated to the workpackage leader to support additional effort required to work directly with the new partners in developing the use case for the region. The partners will translate the project's materials, as they deem appropriate for their region, out of their existing budget.

Description of work

The first task is to identify the SMEs in the four test regions, who are the most likely to wish to use innovative ways of flexible working. As there are many thousands of SMEs in each region, the approach is to reach them through their **business** advisors, by engaging with the 'multiplier' bodies through which the business advisors can be contacted – e.g. Regional Development Agencies, regional Chambers of Commerce, small business and employment networks.

The second task is to define the type of Service Deployment Templates needed by the target SMEs in the test regions. The result is **Deliverable D101 –Service Deployment Template Requirements Definition and Test**

Plan. This enables WP3 to produce the required Templates. Participants in WP1 will play an active part in creating and reviewing Service Deployment Templates with WP3, providing the benefit of their knowledge on user requirements.

The next task is to distribute the initial set of Service Deployment Templates, both printed and electronically, to SMEs through the business advisors, and to promote their use through workshops and conference presentations. Feedback on the successes and problems will be obtained through questionnaires, interviews and workshops. The result of the tests is **deliverable D102 – Results of Tests of Service Deployment Templates, version 1**. This deliverable provides the necessary feedback to enable WP3 to refine and re-release the Templates. It also states the test plan for year 2.

A further cycle of testing of the templates will be carried out in Year 2, resulting in **Deliverable D103 - Results of Tests of Service Deployment Templates, version 2**, in month 20. The remaining four months of the project will be spent in helping to channel and promote the final version of the Templates to as many users as possible and will contribute to the Channelling Progress Reports produced by WP4.

Deliverables

Note: delivery months are based on the full Flexwork project rather than the add-on (which is expected to run for 14 months)

D102   Results of Tests of Service Deployment Templates, version 1: month 12.
Describes the results of the field trials carried out with Group 1 of the SDTs (including a summary of the workshops), and identifies strengths, weaknesses and enhancements required. Sets out the plan for testing Group 2 of the SDTs. The deliverable will include the plans for the second tranche of workshops.

Participant responsible: DTI. Total person months all participants: 6

Depending on the start date of the Add-on this may need to be an update to the Flexwork deliverable

D103   Results of Tests of Service Deployment Templates, version 2: month 20 .
Describes the results of the field trials to test the SDT carried out with Group 2 of the SDTs (including a summary of the workshops), and identifies strengths, weaknesses and enhancements required. Sets out the plan for final dissemination in the test regions.

Participant responsible: DTI. Total person months all participants: 8

Other outputs
At least 4 workshops in each test region in for D102, 4 workshops in year 2 for D103

Milestones and expected result
M101 Update to D101 Month 12

M102: Organisation of workshops in the trial regions – Start of Add-on

M103: Results from the questionnaires on the FlexWork project Month 12 and Month 24

Critical success indicators
- In-depth questionnaires from an average of 5 business advisors per region in the 2 new test regions, showing evidence that the FlexWork Handbook and SDTs have been useful in policy making and/or advising their client SMEs. (Including in what way they were useful and suggestions for enhancements.).

Participant roles	
DTI	Lead workpackage
ALP PECA	Lead Use Case Study in Slovenia
VirTech	Lead Use Case Study in Bulgaria
Mona	Run B Region Workshops
Virtech	Run B Region Workshops

9.1.4 Workpackage number : 4   Interactive Channelling of Results

Start date or starting event:	Start of project					
Participant number:	APDT	DTI	Empirica	Telscom	ULB	Waterford
Person-months per participant:			2			
		A.L.P. PECA	MONA	VirTech	ITTI	
		4	6	4	8	

Objectives

- To channel the Service Deployment Templates and demonstrations, together with associated IST achievements, to potential users and providers of flexible working services.
- To identify appropriate channelling strategies through dialogues with key contacts in user and provider sectors, as well as in "multiplier" organisations, such as EURADA and ADAPT.
- To develop and implement a detailed channelling plan for delivering information to the target sectors in a phased, interactive way.
- To assemble and deliver suitable packages of channelling materials for each of the target audiences.
- To identify and exploit opportunities for promoting relevant IST results to the target audiences.
- To support RDAs in including flexible working strategies in their Regional Development Plans

The new project partners will support the original main object which is mainly ;

To channel information on the created Service Deployment Templates and demonstrations, and associated IST achievements, to potential user and provider sectors and to develop these further as brochures, articles, presentations, on-line and physical demonstrations etc. for wider distribution.

This is achieved by the sub-objectives:

- To establish key contacts in user and provider sectors, as well as in "multiplier" organisations, in dialogue concerning channelling actions.
- To build a close working relationship with Regional development Agencies and related organisations
- To develop a clear channelling plan for the regions of Slovenia, Hungary, Poland and Bulgaria covering all channelling activities and participants as defined in the annexes from A3 to A5.
- To consolidate materials for channelling and produce regional translations.

To deliver materials to target sectors in a phased, interactive action.

The partners will translate the project's materials, as they deem appropriate for their region, out of their existing budget.

Description of work

Channel managers will be appointed for each of the project's target audiences. These audiences will include SMEs and their business advisors in the EU and the accession countries, as well as organisations offering flexible working tools and services to such players. To ensure the maximum impact from the project's limited resources, channel managers will work closely with "multiplier" organisations, such as regional development agencies (eg EURADA), industry associations and confederations, teleworking associations, disabled and elderly organisations, etc to identify appropriate channelling strategies for each of the target audiences.

The channel managers will then draw up detailed channelling plans, specifying the target audiences, the channelling materials required and the mechanisms for delivering and promoting those materials. The channelling materials will consist of Service Deployment Templates and demonstrations from WP3, technology reports from WP 2 and other promotional materials, such as brochures, briefing papers, workshops, conference presentations and articles in the trade press.

A consolidated schedule of channelling materials will be maintained. Responsibility for producing materials not provided by WP2 or WP3 will be assigned to members of the project team.

Channelling materials will be developed and launched in co-operation with an expert press agency. They will also be presented on the project's website in a form that is quick and easy for SMEs to use.

The channelling plans will be reviewed each year. A report will be produced, which presents progress against the previous year's plan, and an updated plan will be produced, which takes account of newly identified requirements and new technical developments.

Products

Each sector will have its own specific package of channelling materials but the principal outputs of this workpackage will include:

- 10 additional articles and news items for magazines and journals read by SMEs in the regions.

- Presentations to agencies supported by European Regional Development Funds on the possibilities offered by new technologies for flexible working, and the relationship to communications infrastructure investment.

Deliverables[12]
D402   Channelling progress report release 1 – month 13
          Participant responsible: Empirica. Total person-months all participants: 18
D403   Channelling plan release 2 – month 15
          Participant responsible: Empirica. Total person-months all participants: 2
 Incorporated into the final report

Milestones and expected result

The deliverables constitute milestones.

The expected result is the effective promotion of Service Deployment Templates for new ways of working to upwards of an additional 1,000 SMEs in the EU regions

Milestone 402 The establishment of FlexWork promotion agreement with business advisors and regional development agencies within the three test regions Month 12

Milestone 402 The establishment of FlexWork promotion agreement with business advisors and regional development agencies in at least 7 other regions Month 16

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Critical success indicators

- 10 additional articles and news items promoting the Handbook and SDTs, placed in magazines and periodicals read by SMEs in peripheral regions. (Assuming an average of 2000 readers per magazine, this equates to 20,000 readers reached.)

- Questionnaires or telephone interviews completed by at least 4 additional regional development organisations showing that they found FlexWork helpful in formulating regional development plans and/or found SDTs useful for their region, including how FlexWork was useful and any additions they would like

Participant roles

Empirica   Lead workpackage;
          take special responsibility for providing speakers to European and regional conferences.
          Channel to Accession Countries
ALP PECA Channelling - responsible for presence at trade shows
VirTech   Channelling - responsible for presence at trade shows
Mona   Channelling - responsible for presence at trade shows
Virtech   Channelling - responsible for presence at trade shows

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[12]   Where a deliverable is a progress report, eg on channelling, the person-months required to produce and disseminate the products described in that report are included in the deliverable person months. This has been done because most products are synergistic sets and cannot sensibly be costed as individual products.

9.2 Deliverables list

Del. no.	Deliverable name	WP no.	Lead particip-ant	Estimated person-months[13]	Del. type	Security[14]	Delivery (proj. month)	Comments
D102	Results of Tests of Service Deployment Templates, version 1	1	DTI	14	Report	Pub	12	Includes some dissemination activities
D402	Channelling progress report release 1	4	Empirica	18	Report	IST	13	Includes person-months spent on channelling
D403	Channelling plan release 2	4	Empirica	2	Report	IST	19	
D103	Results of tests of Service Deployment Template Version 2	1	DTI	18	Report	Pub	18	
D002	Project final report	0	Waterford	10	Report	IST	24	This includes person-months needed to manage the project and produce other regular reports for the Commission

Note: where a deliverable is a progress report, eg on channelling, the person-months required to produce the products described in that report are included in the deliverable person months. This has been done because most products are synergistic sets and cannot sensibly be costed as individual products.

[13] A small number of person-months (3) have not been associated with specific deliverables at this stage, although they are directly linked to WP activities.

[14] Int. Internal circulation within project (and Commission Project Officer if requested)
Rest. Restricted circulation list (specify in footnote) and Commission PO only
IST Circulation within IST Programme participants
FP5 Circulation within Framework Programme participants
Pub. Public document

9.3 Project planning and timetable

9.3.1 Year 1

Activity no	Activity description	Year 1											
		Month 1	2	3	4	5	6	7	8	9	10	11	12
WP0	**Project management**												
	Management of project												
WP1	**Usage Case Studies**												D102
	Establish strategic links in study regions												
	Channel information on flexible working to study region												
	Service Deployment Templates												
	Define requirements												
	Test SDTs												
WP4	**Channelling**												
	Identify key external bodies												
	Appoint channel managers (with WPs 1 & 2)												
	Develop channelling plan												
	Channel early results to IST projects/clusters												
	Channel early results to users bodies												
	Channel SDTs and technology to user bodies and IST												

9.3.2 Year 2

Activity no	Activity description	Year 2 Month 1	2	3	4	5	6	7	8	9	10	11	12
WP0	**Project management**												
	Management of project	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨
WP1	**Usage Case Studies**												D103
	Channel information on flexible working to study regions	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨
	Service deployment templates												
	Test SDTs version 2					▨	▨	▨	▨	▨	▨	▨	
WP4	**Channelling**	D402						D403					
	Review key external bodies	▨											
	Review appointment of channel managers												
	Revise channelling plan	▨	▨										
	Channel updated results to user bodies and IST	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨	▨

9.4 Graphical presentation of project components

Note that some information flows have been omitted for simplicity. For example, the results of testing the SDTs with usage case studies will be fed back from WP1 to WP3 and WP4 but have been omitted from the diagram.
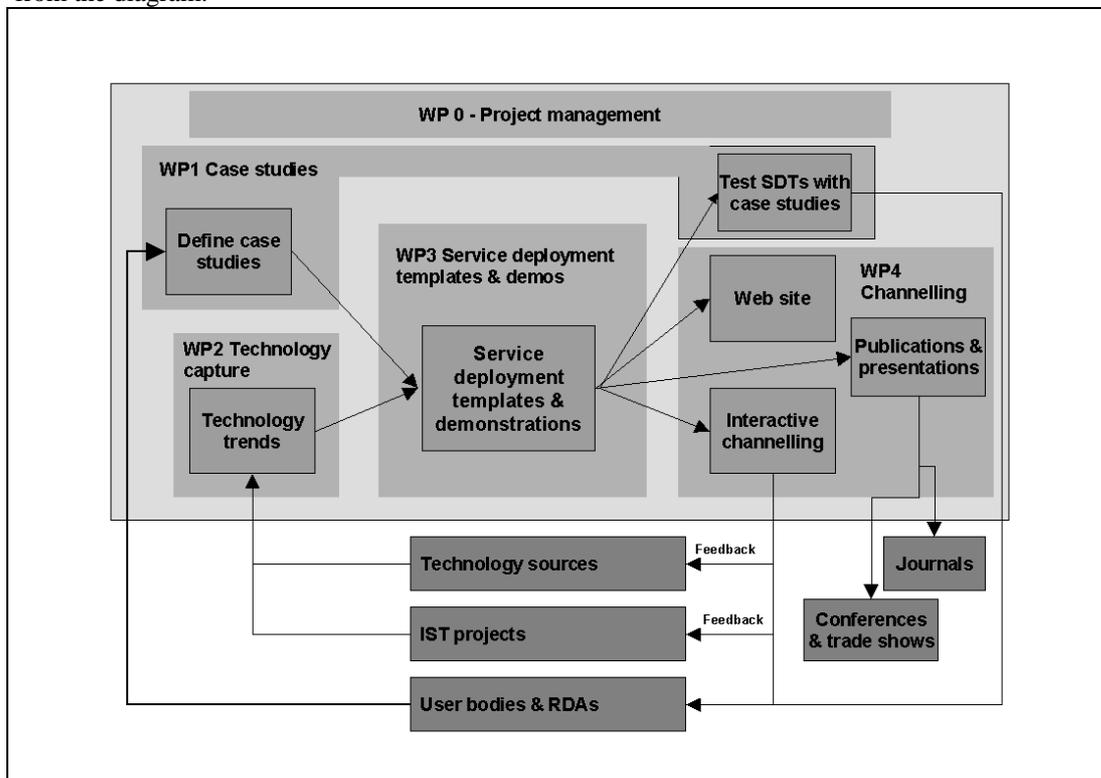
9.5 Project management

9.5.1 Management process

There will be two levels of management: the project management committee, which will have overall responsibility for the success of the project, and the project technical committee which will manage the day to day work of the project.

The project management committee will consist of the project co-ordinator and the workpackage leaders. It will meet at least once every two months, or more often if necessary, by audioconference or physical meeting. This committee will be responsible for the overall control and success of the project, and for resolving any issues or problems that cannot be resolved by the project plenary committee.

The project technical committee, consisting of the project co-ordinator, the workpackage leaders and one representative from each of the project participants, will be responsible for the day to day co-ordination of all tasks and activities. This committee will meet frequently by audio conference, with a physical meeting about every three months. It will provide the Commission with technical, administrative and financial information about the progress of the project to ensure that the project objectives are accomplished in time and within budget. It will be responsible for:

- Preparation and planning of the project

- Monitoring and controlling the project

- Budgetary control

- Liaison with other support actions

- Interface with the Commission

- Ensuring the production of deliverables on time and according to the quality standards set.

The workpackage leaders will be responsible for these items within their respective workpackages.

A detailed project plan will be created at the outset, identifying every key action, milestone and product. It will be distributed to all participants and updated monthly. Progress tracking sheets will be maintained by each workpackage leader of actions and outputs. Minor problems will be dealt with by workpackage leaders. 'Red' issues, which involve major slippage or problems, will be resolved by the project management committee.

9.5.2 Quality control

The project's quality control procedures will ensure that all outputs

- meet a well defined need or use

- satisfy users' expectations

- comply with applicable standards, specifications and regulations

- and are available at reasonable cost

The project's outputs and products will be subjected to four levels of quality control:

- All products of the project will be subjected to review for accuracy and suitability for purpose before release by the editorial team, workpackage leaders and representatives of the relevant external sectors. All internal deliverables, such as progress reports for the Commission, will be reviewed by workpackage leaders, and other key members of the project, before release.

- Technical accuracy will be checked with the projects supplying the original information.

- Physical quality will be verified against the house style.

- Performance will be analysed and fed back to the relevant field of activities.

A project handbook will be issued at the outset to all members of the project, laying down procedures and document standards.

A key method of assessing, and therefore managing, the quality of the project will be through the use of questionnaires to be completed by the organisations which work with the project.

In the Usage Case Studies activity, these will form an integral part of the process of specifying and testing the SDTs. Their precise form and distribution will be defined as part of the detailed planning[15] in the early stages of the project. These questionnaires will be completed as part of the workshop process, as part of structured interviews, or by post/e-mail.

The success of the dissemination activity will be measured by using questionnaires or structured interviews with recipients of information from FlexWork. These will be designed to assess how well the information provided by the project helped these organisations to advise their members/clients on the approach to be taken to realise the benefits of flexible working (or, in the case of SMEs, how well it helped them to take those decisions themselves). Because the structure of these channels (RDAs etc) varies so much between regions, the precise number of questionnaires, and who they will be sent to, will be agreed with the Commission as part of the channelling plan (Deliverable D401). The detailed design of these questionnaires will form part of the project, but the topics to be covered will include:

- The technical and social environment in which the SMEs work (to establish any constraints on what they could achieve)

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[15]   Since the planning involves considerable interaction with the agencies in the Usage Case Study regions, it is not possible to produce detailed plans until the start of the project.

- The degree of flexible working before and after interaction with FlexWork

- The usefulness of the FlexWork products in confirming or modifying the strategy of the SMEs and/or agencies

- How helpful they found the interaction with FlexWork project team.

9.5.3 Intellectual property

Any intellectual property generated by FlexWork will be jointly owned by the consortium and the Commission. IST projects supplying information to FlexWork for publication, will be clearly informed beforehand that the information is to be put in the public domain via FlexWork products.

9.5.4 Risk management

Risks will be minimised by ensuring the co-operation of IST projects, through personal contacts that actively promote the benefits of co-operation to them. These benefits include publicity for and technology transfer of their achievements to large numbers of prospective customers outside the IST community, together with feedback about the needs and issues of these customers. Personal contacts will be used to collect information from projects, rather than forms and questionnaires, so as to make the process quick and easy for them.

Another way of reducing risk will be to ensure the co-operation of external bodies representing regional development agencies, users and service providers, manufacturers, standards and regulatory bodies, by personally contacting them, offering them a summary of the outputs of FlexWork which are most relevant to their particular business.

Conference organisers and technical/trade press editors will be likely to accept material offered by FlexWork because members of the consortium have excellent contacts with major conference organisers and extensive experience of identifying high quality presentations for their events. The subcontractors will include professional press agencies and publishing houses that can capture the specific requirements of editors and feed these back to the FlexWork team. Members of the Channelling team have an established track record in producing material that is attractive to readers of the trade and scientific press.

9.5.5 Project assessment and evaluation

A suitable evaluator will be identified who will carry out a review every year of the project's performance against the metrics of success listed in Section 2 - Project objectives. The conclusions of this review will be included in the annual Project Review Reports to the Commission.