European Commission

DEVELOPMENT OF SOLUTIONS AND AN ONLINE GUIDE ON FOSTERING THE REVITALISATION AND MODERNISATION OF THE SMALL RETAIL SECTOR

FINAL REPORT – METHODOLOGY ANNEX

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Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
Grow DDG2.E. – Modernisation of the Single Market
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2017

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1 Methodology

1.1 Characterisation of the sector

This study began with a STEEP analysis to identify the major Social, Technological, Economic, Environmental, and Political challenges faced by small retailers in Europe; this is a variation of a PEST (Political, Economic, Social, Technological) or PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis. All of these approaches appear to have been developed from the basis provided by Aguilar in 1967[1] when he proposed ETPS (Economic, Technological, Political, Social), which then became PEST, and later had variations of STEEP or PESTLE, adding environmental and then legal factors. These provide a pragmatic approach to an analysis of external factors rather than a theoretically based analytical tool.

The STEEP analysis employed provided a practical framework within which to evaluate the different external factors that may impact a small retailer. The analysis aimed to identify the external factors that are impacting small retailers today and in the near future, and considers any implications of those impacts for small retailers.

1.2 Selection of relevant technologies

1.2.1 Details for Criterion: Relevance of the retail technology assets

The evaluation of the **relevance of the retail technology assets** was based on i) the ROI and on ii) customer effectiveness and iii) retailer efficiency.

The **"ROI challenge"** as presented in the core report covers specific criteria/components addressing costs and benefits, such as the payback time and the time to deploy for retailers. All components were enumerated herewith. The ROI challenge is rated as high, medium or low.

Table 1: Components of criterion "Feasibility to adopt or use the technologies (ROI challenge)"

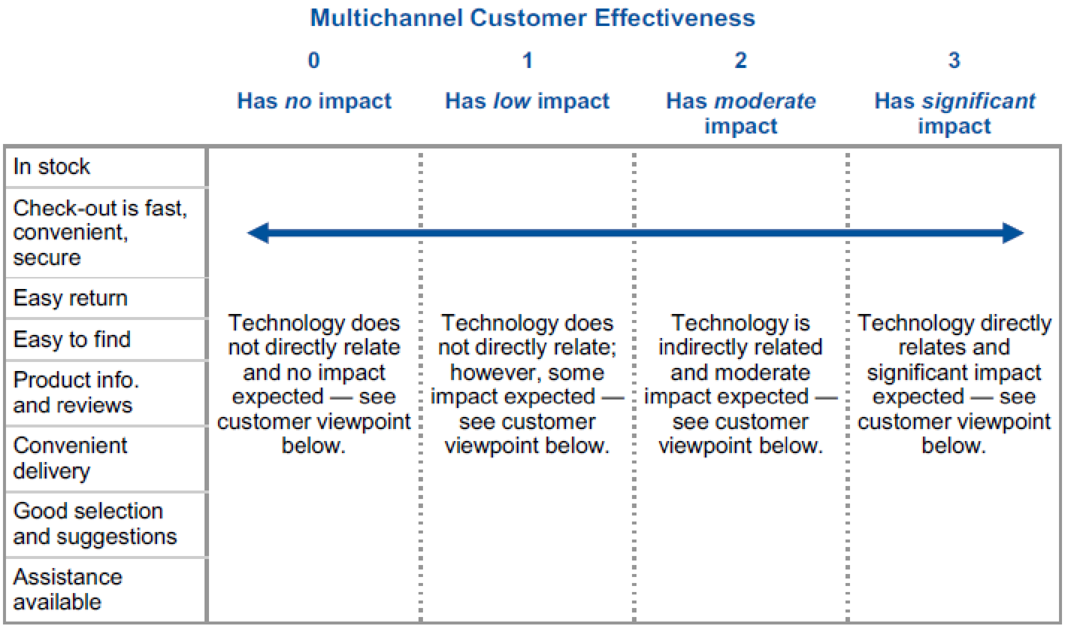
	ROI Challenge			
	0	1	2	3
	No Challenge	Low Challenge	Medium Challenge	High Challenge
Time to deploy	< 1 year	←	→	3+ years
Ease of measuring benefits	A direct link from the technology to an already-collected metric	←	→	Benefits are almost completely qualitative, require significant work/analysis or new workflow to understand
Multiple department dependencies	Stand-alone, with no real dependency	←	→	Would require 2 to 3 other departments to change processes or invest in new technology
Multiple project dependencies	Stand-alone, with no real dependency	←	→	Project requires 2 to 3 other projects to be completed before benefits or functionality can be achieved
Cultural change required	Little to no change management required	←	→	Significant change management program required to implement
Investment required	Falls easily within existing department budgets	←	→	Board approval required; investment required at every location to achieve benefits
Perceived risk of tech.	Well-established, with publicly known successful rollouts	←	→	New technology, with only minimal pilots to point to
Payback time	< 1 year	←	→	3+ years

[1] Aguilar F. (1967) Scanning the Business Environment. MacMillan

Note that, however, there is no direct correlation between the degree of challenge of obtaining ROI for a particular technology or application and the priority that should be given to investments in that technology or application. In technology investments, those technologies that are the most challenging to adopt can also generate most benefits. Simply because a technology is considered a limited challenge in terms of ROI thus does not necessarily mean that it should be given priority in terms of investment of resources.

In general, the technologies that retailers should consider giving higher priority to in terms of investment are those that deliver higher levels of customer effectiveness and retailer efficiency — for example, in store technologies such as mobile point of sale (POS).

The **effectiveness** of each technology related to the customer experience places each technology alongside eight components. These are listed in the table below. The rating scale goes from "no impact" to "significant impact".



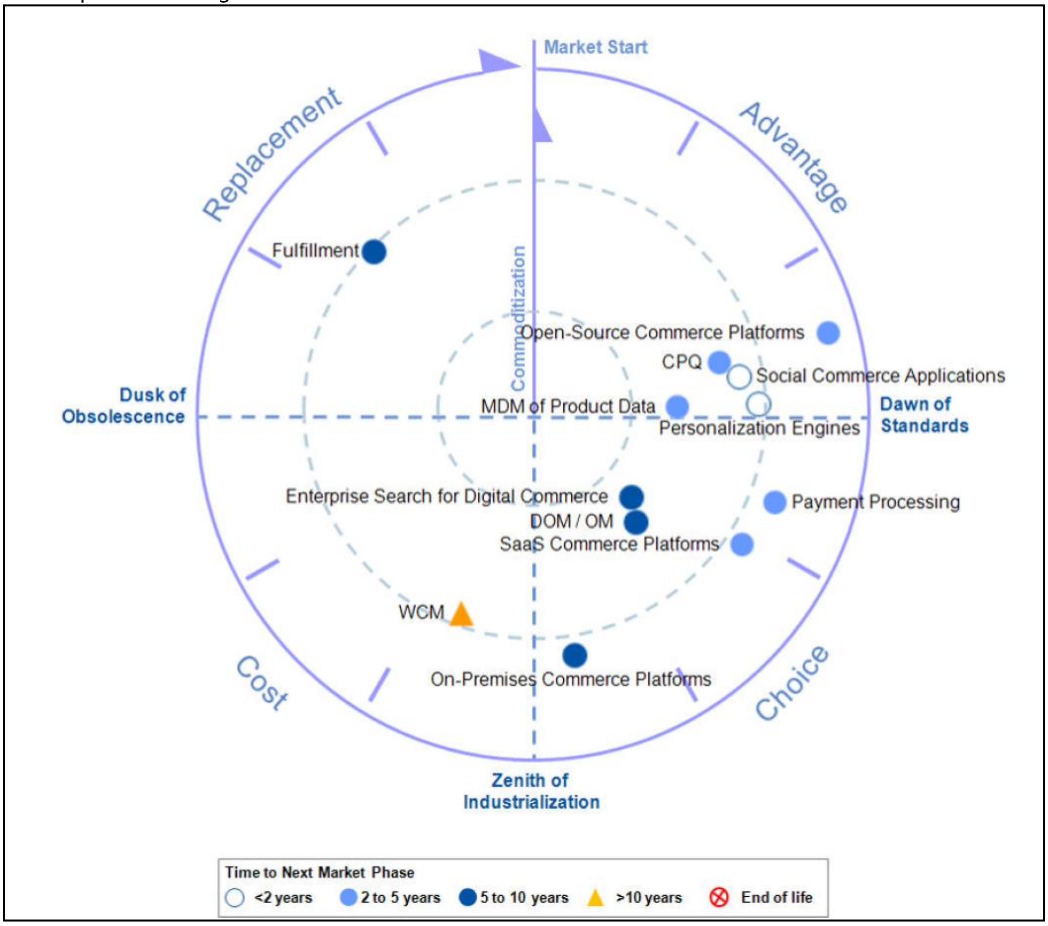
The retailer **operational efficiency** dimension encompasses measures designed to identify the various aspects of a retailer's business processes (as listed in the table below), and to determine the potential impact of each technology on the overall impact on internal retailer efficiencies. This dimension can be considered as reflecting profitability improvements based on efficiency and cost-saving impacts.

	Retailer Operational Efficiency			
	0 Has *no* impact	1 Has *low* impact	2 Has *moderate* impact	3 Has *significant* impact
Merchandise Labor Inventory Price Supply Chain Multichannel	Technology does not directly relate and no impact expected — see retailer viewpoint below.	Technology does not directly relate; however, some impact expected — see retailer viewpoint below.	Technology indirectly relates and moderate impact expected — see retailer viewpoint below.	Technology directly relates and significant impact expected — see retailer viewpoint below.

1.2.2 Details for Criterion: Feasibility to adopt or use the technology (Market clock phases)

- The criterion of feasibility to adopt the digital commerce assets was assessed though Gartner research on the IT Market Clock depicting the market life cycle in which the asset is in as well as the degree of commoditisation.

Figure 1: Market clock phases for digital commerce



During the early stages in the life of a specific digital commerce technology asset, the value it delivers will be available to fewer businesses, and it will usually be highly differentiating, commanding a higher price. The rate of innovation is also likely to be high, along with the level of skills needed to fully exploit it. If demand and supply grow, processes become more standardised, and the skills required to exploit the technology become more readily available, hence reducing costs. This leads to the technology entering a mass-customised phase during which it becomes semi-industrialised — typically consisting of standardised modules or components that require some customisation in deployment to meet the needs of buying organisations.

As the technology matures, the level of choice will continue to grow and the skills required to use it will cease to command a premium price. Products and technologies from competing suppliers become more functionally equivalent, making it easier to switch among them. The asset class will then be at its most commoditised and price competition will be at its highest.

Higher levels of commoditisation typically lead to market consolidation, as scale becomes a requirement for profitably delivering products and services under growing price pressures. Where competition is not evident, the availability of the appropriate skills and support from adjacent products will decline as technology assets approach the end of their support lives. The result is a final phase of market development, during which the level of commoditisation for the asset class decreases. Prices rise because of reduced supplier choice or declining availability of the skills needed to maintain and run the products.

For each digital commerce technology asset class, **market life** is a relative measure of where the asset class currently sits in its life cycle. Measures are stated using the metaphor of a 12-hour clock face, and the full market lifetime of delivery comprises one complete 12-hour cycle, from 12:00 until 12:00.

The market life comprises four phases:
1. **Advantage:** From 12:00 to 3:00, during which time the market typically moves from emerging status to adolescent status. Levels of demand and competition are typically low, so the technology is procured for what it delivers, not for its placement in its market;
2. **Choice:** From 3:00 to 6:00, during which time the market typically moves from adolescent status to early mainstream. This is the phase of highest demand growth, during which time supply options should grow and prices should fall at their fastest rate;
3. **Cost:** From 6:00 to 9:00, during which time the market moves from early mainstream to mature mainstream status. During this phase, commoditisation is at its highest level, and cost will be the strongest motivator in most procurement decisions;
4. **Replacement:** From 9:00 to 12:00, during which time the market moves from mature mainstream status through legacy and to the market end (after which, the technology is no longer viable to procure or use). Procurement and operating costs steadily rise, so enterprises will seek alternative approaches to fulfilling business requirements.

Commoditisation is shown on the IT Market Clock as the (radial) distance from the centre of the clock; the farther out an asset class is, the more commoditised it is. Commoditisation is the sum of three measures:
1. **The level of standardisation**: Determines the potential ease with which the product or technology can be interchanged, which helps the buyer's potential capability to exercise choice;
2. **The number of suppliers**: Defines the range of choices available to buyers and their potential ability to take advantage of the interchangeability or interoperability yielded by standardisation;

3. **Access to the appropriate skills**: Every digital commerce product and technology requires some level of internal capability to use it. The ease with which these capabilities can be obtained and augmented directly impacts on the internal cost of switching suppliers.

1.3 Identification of best practices

1.3.1 Member State research

General approach in each Member State

The information collected in each Member State consists of national, regional/local and e-commerce information. The format on how to best collect such information depended on the specific setting. **As a minimum** in terms of activities desk research and interviews were conducted. To what extent interviews served as validation or as data collection source depended on the information available through desk research and the timing of the interview. The general approach was based on the following steps:

1. Get a **quick overview on what can be found** through desk research;
2. Get an **overview of who to best contact** for interviews;
3. **Report back** to core team;
4. **Schedule** interviews;
5. **Collect information** and frame into the template;
6. Use interviews to **validate/select** from draft findings and to collect more information;
7. **Conduct further desk research** (and if necessary interviews).

Over 200 initiatives were identified as part of this exercise, the collection of which may be found in a longlist in the Case Study Annex.

1.3.2 Case studies

Case study selection

According to the Terms of Reference (ToR) two types of case studies were to be conducted:

- **15 Regional/local cases**: these are cases "where innovative actions are undertaken to foster the revitalisation and modernisation of the small retail sector" with a focus on "actions that have a link with digital technologies";
- **5 e-commerce cases**: these are "local or regional e-commerce platforms that were created to allow small retailers to sell online, in particular at a local level."

The case study work built on the draft findings of task 1 (characterisation of the small retail sector, characterisation of digital technologies, adaptation of technologies in retail, costs and benefits of technologies) and EU28 information collection about national strategies to revitalise and modernise the small retail sector and an overview of potential regional/local and e-commerce cases.

Requirements of the ToR affecting case selection

The ToR list the following aspects to be taken into consideration when selecting regional/local cases:

- Cases should include innovative actions;
- There should be a link with digital technologies;
- Balance between actions undertaken by regional and local bodies (e.g. authorities or business organisations such as chambers of commerce);

- Actions undertaken with or without the co-operation of the retail sector or other private business partners;
- Actions undertaken by retailers in co-operation with other business partners or developed directly by other business partners;
- Balance between large and small Member States;
- Fair north-south and east-west geographical representation;
- Urban and rural environment;
- Include at least one border region.

For the selection of e-commerce case studies the following aspects needed to be taken into consideration:

- Actions undertaken by regional and local bodies with or without the co-operation of the retail sector;
- Actions undertaken by retailers in co-operation with other business partners or developed directly by other business partners;

Platforms across the EU. Key characteristics of the sector affecting case selection.

The key characteristics of small retailers can be summarised as Product, People, and Place: something to sell, someone to sell the product and manage the business, and somewhere to sell the product from. However, for the purpose of our study in considering the development of solutions for fostering the revitalisation and modernisation of the small retail sector, the key relevant attributes of small retailers are Place and Product, as the People aspect is personal to an individual retail business. Inevitably, some retail businesses are better resourced and better run, just because of the people involved.

Thus, in selecting examples of small retailers for further study, the key relevant attributes considered were: Market, Location, and variety of Product. The selected examples included thus retailers which represent the different key cost challenges of small retailers: cost of goods sold, staff costs, and real estate charges.

However, any analysis based on an average or typical store was considered very misleading as no such store exists. This is because, in reality, the small retail sector is very diverse, with each small retailer having their own unique set of characteristics.

Basis for selection coming out of EU28 Member State research

The country research in all EU28 Member States provided a longlist of more than 100 examples of regional/local initiatives. However not all of them were well suited as good practice examples. Particularly in the new Member States, the scope of what types of initiatives were to be included had to be widened to find examples.

In addition, the longlist consisted of almost 100 e-commerce platforms to be selected from. (Note: the longlist of identified initiatives and cases is presented in a separate Case Study Annex).

Selection of cases

On the basis of the criteria outlined, 15 regional and 5 e-commerce cases where presented to the European Commission including a back-up list with alternatives. Based on the comments from the EC, some cases were replaced. All case studies conducted are presented in the separate Case Study Annex.

Case study methodology

The format on how to best collect information depends on the specific case study setting. In general they were based on desk research and a series of interviews including initiators and participants of the initiative. For e-commerce cases a slightly different template was used.

1.3.3 Regional workshops

Four regional workshops were organised in the framework of this study in the month of February 2017. They took place in:

- Oxford (UK);
- Madrid (ES);
- Warsaw (PL);
- Lisbon (PT).

All workshops were organised in a one day format with about 20 attendants being either small retailers themselves, retail associations, regional and local authorities, or representatives from successful initiatives/case studies. At each workshop we first discussed the local situation and then presented and discussed good practice examples identified to collectively validate the findings and draw conclusions for the development of practical solutions.

The agendas of the four events can be found below:

Agenda: Revitalising Small Retailers - Oxford Workshop

Saïd Business School, University of Oxford

1 February 2017

Timing	Agenda points
10:30	***Coffee/tea available on arrival***
11:00 - 11:20	• **Welcome & introductions** Richard Cuthbertson, University of Oxford • **General presentation of the project and opportunities arising for small retailers due to technological advancements** Andreas Pauer, Ecorys Richard Cuthbertson, University of Oxford *Aims, process, expected outputs*
11:20 - 12:00	• **Retail innovation and small retailers: UK in the European context** Jonathan Reynolds, University of Oxford *Presenting the UK context, the problem analysis for the EU and small retailers* • **Discussion of the problem analysis and the UK context** (everyone): *What are the various challenges, trends* *Sharing and validating interim findings*
12:00 - 12:30	• **The Great Gloucestershire High Street program** Polly Barnfield, Maybe *Identification of the issues arising (everyone)*
12:30 - 13:00	• **Case study presentation of Gloucester Digital High Street** Jason Smith, Marketing Gloucester *Identification of the issues arising (everyone)*
	Lunch break and networking
14:00 - 14:45	• **Case study presentation: helping SMEs develop their online business** Fabio Fulvio, Confcommercio • **Discussion of the opportunities and challenges of adapting to new technologies** (everyone) *Sharing and validating interim findings*
14:45 - 15:30	• **Assessing the effectiveness of best practices, and ideas for an online guide** (everyone) *Comparing to solutions from different area* • **Factors influencing the effectiveness of best practices** (everyone) *Assessing the transferability of solutions*
15:30 - 16:00	• **Summary and conclusion** (everyone) *Agreement on the needs, scope and style of an online guide (everyone)*

Agenda: Revitalising Small Retailers – Madrid Workshop

Directora General de Comercio y Emprendimiento,
Área de Gobierno de Equidad, Derechos Sociales y Empleo
7 February 2017

Timing	Agenda points
10:30 - 11:00	***Welcome coffee and registration***
11:00 - 11:30	• **Welcome & introductions** Clémentine Valayer, Gartner • **General presentation of the project and opportunities for small retail from technology** Andreas Pauer, Ecorys, Clémentine Valayer, Gartner *Aims, process, expected outputs of the project, overview of **best practices***
11:30 – 11:45	• **General assessment of the situation in Spain** Led by Andreas Pauer, Ecorys, everyone *Presenting the Spanish context* • **Discussion of the problem analysis and the Spanish context** (everyone): *What are the various challenges, trends* *Sharing and validating interim findings*
11:45 - 13:00	• **Case study presentation of** Commerce Connecté in the Walloon Region (Belgium) : Hélène RAIMOND - Agence du Numérique • **Case study presentation of** 9 Straatjes community from the city of Amsterdam (Netherlands): Lony Scharenborg Community manager • **Discussion of the two case study experiences** (everyone)
13:00 - 14:00	***Lunch – courtesy of the City Council of Madrid***
14:00 – 14:45	• **Case study presentation of a digital solution**: **Mercado 47 and the Hermeneus World platform** Concepción Díaz de Villegas Soláns – Madrid city council Eduardo Elorriaga Bracho - CEO & Founder of Hermeneus World • **Discussion of the opportunities and challenges of adapting to new technologies** (everyone)
14:45 – 16:00	• **Assessing the effectiveness of best practices incorporating ideas for an online guide** Andreas Pauer, Ecorys: Effectiveness analysis **Factors influencing the effectiveness of best practices** (everyone) *Assessing the transferability of solutions*

Agenda: Revitalising Small Retailers – Warsaw Workshop

Kozmiski University

9 February 2017

Timing	Agenda points
10:30 - 11:00	***Welcome coffee and registration***
11:00 - 11:30	• **Welcome & introductions** • **General presentation of the project** (project team) *Aims, process, expected outputs*
11:30 - 12:15	• **General assessment of the situation in Poland and in the EU context** (*Ministry of Development*, *Polish Chamber of Commerce and Distribution (POHiD) on behalf of the Polish Institute for Market Research (IBRKK)*, *The Chamber of Commerce and Industry of Romania (CCIR)*, project team) *Presenting the Polish context and the comparative setting in Romania* • **Discussion of the context and problem analysis** (everyone)
12:15 - 13:00	• **Different approaches towards revitalisation** (project team) • **Presentation of types of revitalisation and modernisation initiatives** (project team) • **Presentation of Polish examples and good practice examples in the EU** (project team) *Discussion on comparative situation: differences in initiatives between EU Member States* (everyone)
13:00 - 14:00	***Lunch break***
14:00 - 14:45	• **Presentation about innovation in SME retail** (*FMCG Business Consulting*) **and examples of digital solutions** (project team) • **Discussion of the opportunities and challenges of adapting to new technologies** (everyone) *Sharing and validating interim findings*
14:45 - 16:00	• **Assessing the effectiveness of best practices and the transferability of solutions into the Polish context (incorporating ideas for an online guide)** (everyone) *Comparing to solutions from different areas and bringing them into the Polish context. Are these solutions interesting for Polish retailers? What would be different and/or difficult? Would it work and if yes/no, why (not)?* • **Factors influencing the effectiveness of best practices** (everyone) *Assessing the transferability of solutions/Is the context transferable?*

Agenda: Revitalising Small Retailers – Lisbon Workshop

CULTURGEST

21 February 2017

Timing	Agenda points
10:30 - 11:00	***Welcome coffee and registration***
11:00 - 11:30	• **Welcome & introductions** • **General presentation of the project (project team)** *Aims, process, expected outputs*
11:30 - 12:15	• **General assessment of the situation in Portugal and the EU context** (MEP João Ferreira, Carla Salsinha (União de Associações do Comércio e Serviços de Portugal), Jose Brinquete (Confederação Portuguesa das Micro Pequenas e Médias Empresas), (project team) *Presenting the Portuguese context, the general problem analysis and country feedback* • **Discussion of the problem analysis and the Portuguese context** (everyone) *What are the various challenges, trends?*
12:15 - 13:00	• **Presentation of Portuguese and comparative EU examples** (with project team) ○ *Porto Paralelo (Marta Nestor)* ○ *I shop Braga (Daniela Pereira/Rui Marques)* • **Discussion of experiences** (everyone) ○ *What are the various challenges, trends?* ○ *Sharing and validating interim findings*
13:00 - 14:00	***Lunch break***
14:00 - 14:45	• **Examples from other Member States** (with project team) ○ *Clockwork City (Chris Hurst/Xavier Anderson)* ○ *The German Retail Dialogue (Boris Hedde, TBA)* • **Discussion on the challenges of revitalisation and digitisation actions** (everyone) *Sharing and validating of interim findings*
14:45 - 16:00	• **Assessing the effectiveness of best practices incorporating ideas for an online guide** (everyone) ○ *Comparing to solutions from different areas* ○ *Failed attempts? What went wrong and why?* • **Factors influencing the effectiveness of best practices** (everyone) *Assessing the transferability of solutions*

1.3.4 Brussels seminar

The Brussels seminar was organised in April 2017 with the primary focus to fine tune and further sharpen the developed solutions and to collect first feedback on the draft guide. The event was organised in a one day format with about 30 participants representing best practice cases, local authorities and representatives from EU associations. At the heart of the workshop was the so called "World Café" where the different solutions were discussed and further elaborated in four rotating discussion groups.

The agenda for the Brussels seminar can be found below:

Revitalising Small Retailers in Europe – Brussels Seminar

Hotel Bloom – Meeting room 2

Rue Royale 250, 1210 Brussels

Brussels, 25 April 2017

<table>
<tr><th>Timing</th><th>Draft Agenda points and speakers</th></tr>
<tr><td>09.30 - 10:00</td><td>Welcome coffee and registration</td></tr>
<tr><td>10:00 - 10:15</td><td>Welcome & introductions
Welcome words, agenda of the day, introduction
speakers: Roelof Jan Molemaker (Ecorys), Maria Rehbinder (European Commission)</td></tr>
<tr><td>10:15 – 10:45</td><td>Presentation of draft findings of the project: "Development of Solutions and an Online Guide on Fostering the Revitalisation and Modernisation of the Small Retail Sector"
Characterisation of the sector, problems, challenges and opportunities for small retailers in the EU
speaker: Richard Cuthbertson (University of Oxford)
Digital technologies for small retailers
speaker: Clementine Valayer (Gartner)
National, regional and local initiatives, their objectives and effectiveness
speaker: Paul Baker (Ecorys)</td></tr>
<tr><td>10:45 – 11:00</td><td>Coffee break</td></tr>
<tr><td>11:00 – 12:30</td><td>Presentation of best practices for revitalising small retailers
Introduction of context (identification of best practices and 7 themes of practical solutions)
speaker: Andreas Pauer (Ecorys)
Presentation of best practice examples by representatives of the initiatives (with a focus on the evaluation of the project, lessons learned etc.)
speakers (tbc): representatives of: GUUTE, Commerce Connecté, Mercado47, E-Shopping Offensive
Overview of further best practices and bringing examples into context (speaker: Andreas Pauer (Ecorys))</td></tr>
<tr><td>12:30 - 13:30</td><td>Lunch break</td></tr>
<tr><td>13:30 - 15:00</td><td>World Café: Developing practical solutions for modernisation and revitalisation of small retailers
Format: 4 groups, 4 tables, 16 discussions
Table 1: Local strategy, development of policy, Stakeholder organisation and engagement, Sector information & knowledge sharing
moderator: Paul Baker (Ecorys)
Table 2: Public infrastructure improvements, non ecommerce platforms, digital tools and applications
moderator: Richard Cuthbertson (University of Oxford)
Table 3: Maturity screening, Innovation testing, skills development ,digital awareness
moderator: Andreas Pauer (Ecorys)
Table 4: Ecommerce platforms, communication and promotion (including social media) and other promotion activities
moderator: Clementine Valayer (Gartner)</td></tr>
<tr><td>15:00 – 15:30</td><td>Presentation and discussion of the guide concept to revitalise small retailers
Presentation of guide concept, style, language and visualisation
speaker: Karen Hayer (Ecorys)
Discussion on guide, its style and content and dissemination strategy
moderator: Roelof Jan Molemaker (Ecorys)</td></tr>
</table>

Timing	Draft Agenda points and speakers
15:30 - 16:00	• **Conclusions and closing words** o Conclusions of the seminar *speaker: Roelof Jan Molemaker (Ecorys)*

1.3.5 Survey

Participants

The participants were selected as those with interests in the development of small and medium sized (SME) retailers, either via participation in the workshops, contribution to the case studies, or were representatives of municipalities or small retailers. People were contacted individually and others via their trade or town associations, including EuroCommerce and Independent Retail Europe. 23 participants have provided valid responses, split between public and commercial organisations (8 local authorities, municipalities, or town centre managers, 11 trade and other associations, 3 independent retailers, and 1 technology company). The respondents represented views from across Europe, particularly as some of the trade associations have pan-European, rather than national, responsibilities. However, the locally focused respondents were biased towards the main case study countries of Austria, Belgium, France, Ireland, and Spain. Notable absent views, (although indirectly represented by pan-European organisations), were those from Eastern Europe, the Nordics, Germany, and the UK. While this data is not enough to carry out a full statistical analysis at this time, it does help to provide indicative results to inform the overall findings. However, all of the results should be treated with caution based on the above shortcomings.

Data collection

The survey was set up using SurveyMonkey and sent to participants in English via a weblink on 15th May 2017, with a reminder being sent on a weekly basis. Workshop participants were also contacted via phone where possible and encouraged to fill in the survey. The offer of arranging translation was also made if required – though interestingly survey responses were lower in those countries with a high percentage of English speakers. Paper versions of the survey were also made available to those that requested them.

Format

The survey was sent out with an introductory email as follows:

> *"Dear participant,*
> *You have been selected as someone with interests in the development of small and medium sized (SME) retailers.*
> *As you know, such retailers play an important role in the life of city centres, towns and villages and are facing many challenges as consumer behaviour and demands change. A particular challenge is adapting to e-commerce and the use of new digital technologies.*
> *In this context, the European Commission has contracted the research specialists Ecorys, the Oxford Institute of Retail Management at Saïd Business School, University of Oxford, and their sub-contractor, the technology experts Gartner, to investigate the challenges faced by small retailers in modernising and to look at how these can be addressed. The aim is to develop practical solutions to help the sector – with a particular focus on the use of digital technologies.*

The researchers have identified a number of good practices that help revitalise and modernise the small retail sector across Europe. These have been categorised, discussed in workshops across the EU, and the findings synthesised.
We would now like you to advise us of what you think of our findings. We need you to tell us which actions you believe are the most effective, and which you believe are the most urgent to help the small retail sector. We also need you to tell us if there are any missing factors.
We kindly invite you to complete the following survey by clicking here: https://www.surveymonkey.com/r/Revitalisingsmallretailerssurvey .
Please circulate this web link to others that may be interested in providing their views.
At the end of the survey, we provide you with the opportunity to receive the full report of our work on best practices across Europe.
Many thanks in anticipation."

Questions

The survey questions were split into sections as follows.

Background questions

In order to ensure that the survey covers all types of stakeholders, we need to understand your own organisation and experience.

1. Which country are you based in?

Austria Belgium Bulgaria Croatia Republic of Cyprus Czech Republic Denmark Estonia Finland France Germany Greece Hungary Ireland Italy Latvia Lithuania Luxembourg Malta Netherlands Poland Portugal Romania Slovakia Slovenia Spain Sweden United Kingdom Other (please specify) …

2. Which of the following best describes where your organisation mainly operates?

Rural City or town centre Suburbs

3. Which of the following best describes your organisation?

Independent retailer Franchisee Corporate retailer Town centre manager Shopping centre operator Local authority / municipality Trade and other associations Other (please specify) …

4. What is the focus of your current role?

Retailing Marketing Information Technology / Digital Public policy Other (please specify) …

5. How many years of experience do you have in your current or similar role?

0-1 years experience 1-5 years experience 5-10 years experience >10 years experience …

The next eight questions set out different solutions that have been identified across the EU as fostering the revitalisation and modernisation of the small retail sector. You will be asked in turn to rank which actions you consider to be the most effective solutions to help small retailers. You can add any missing solutions in your reply to question 14.

Most effective public policy and strategy solutions

Small retailers are an important source of economic activity and employment, who are largely seen as making a positive contribution to the attractiveness, differentiation, and quality of life in local areas. Such retailers face multiple challenges linked to the general economic conditions, the policy and regulatory background, new technologies, especially digital, and changing social/consumer behaviour and expectations. These challenges often culminate in the decline of city and town centre shopping areas and rural retailing. Traditional small retailing is a geographically dispersed activity and public policy tends to be dispersed accordingly, resulting in a multitude of local initiatives.

6. Please rank the following public policy and strategy solutions that you think are most effective in helping small retailers (where 1= most effective).

	National government developing policies and strategies aimed at modernising small retailers, including digitalisation
	National government developing policies and strategies aimed at revitalising urban and rural areas
	Local authority/municipality developing policies and strategies aimed at modernising small retailers, including digitalisation
	Local authority/municipality developing policies and strategies aimed at revitalising a village/town/city centre, such as a promotional strategy for events, such as fairs, to encourage consumers to visit a village/town/city centre
	Community promotional activities and events, such as fairs organised by local associations and interest groups, to encourage consumers to visit a village/town/city centre

Most effective help for local authorities

It is generally acknowledged that there needs to be a local dimension to the formulation of strategies and policy initiatives to support small retailers. Successful approaches, whether targeted at the retail sector alone or for urban centres, peripheral and rural areas can be assisted by national or regional administrations. Such actions can support local-level policy formation.

7. Please rank the following steps to assist local authorities and municipalities formulate policy and strategy that you think are most effective in helping small retailers (where 1= most effective).

	Tool kits that provide guidance and best practice examples
	Facilities to provide expertise, including sector knowledge, legal advice
	Opportunities to exchange best practices and experiences with other local authorities at national or regional level
	Opportunities to exchange best practices and experiences with other local authorities at the European level
	Guidance on funding, including the use of EU funds, setting up public-private partnerships
	Guidance on evaluation exercises and data collection for benchmarking performance

Physical infrastructure improvements

Improvements in public infrastructure can play an important role in helping (re)connect small retailers and customers. This can be through investments in upgrading and maintaining physical infrastructure in and around retail zones. This may be to increase the attractiveness of a shopping area, ease shoppers ability to travel to a shopping area by providing real time transport information, increase accessibility to shopping areas including parking facilities and more generally, increase the quality of life in city centres.

8. Please rank the following physical infrastructure improvements that you think are most effective in helping small retailers (where 1= most effective).

	Publicly funded development of physical infrastructure
	Privately funded development of physical infrastructure
	Public-private jointly funded development of physical infrastructure

Digital infrastructure improvements and provision of digital tools and applications

Improvements in digital infrastructure can play an important role in helping (re)connect small retailers and customers. Providing better 4G (or soon 5G) coverage in city centres and combining it with activities to put retailers – individually or collectively – on the digital map are another way to connect with customers. This can help enable customers to locate stores and check out their offers 'on-the-go'. Providing small retailers with internet access can be a simple but crucial step to facilitating their online presence, enabling them to raise awareness of their shops, products, services and promotional offers among consumers. This can be done by creating a platform based community between the inhabitants and local commerce.

9. Please rank the following digital infrastructure improvements that you think are most effective in helping small retailers (where 1= most effective).

	Publicly funded development of digital infrastructure, providing 4G (or soon 5G) coverage and internet access
	Privately funded development of digital infrastructure, providing 4G (or soon 5G) coverage and internet access
	Public-private jointly funded development of digital infrastructure, providing 4G (or soon 5G) coverage and internet access

10. Following on from the introduction to question 9, please rank the following digital tools and applications that you think are most effective in helping small retailers (where 1= most effective).

	Provide small retailers with commercially developed digital tools designed specifically for them, such as mobile apps and electronic loyalty cards
	Create a community digital platform enabling retailers to have an online presence and be put on a digital map so they can be located
	Help small retailers to put themselves on a digital map so they can be located
	Help individual small retailers to develop their own individual online shops
	Help small retailers to develop an online shop for a particular community or location
	Help small retailers to use basic IT systems and software, such as card payment systems
	Help small retailers to employ more advanced management applications, such as financial , human resources, and supply chain management systems etc.
	Help for small retailers to decide what IT systems to invest in
	Provide small retailers with the opportunity to use software applications through a service provider

Provision of digital skills training

Many traditional small retailers are being left behind by the rapid progress in digital technologies and changing consumer behaviour. Small retailers can benefit from improvements in their digital awareness by receiving training that supports them understanding their needs and capabilities, which can be done through digital maturity screening aimed at assessing capabilities and capacities of retailers to successfully implement and use new technologies. Small retailers can also be helped to understand and adapt to the digital era.by training to develop and upgrade their knowledge and skills. Small retailers need help to determine in advance whether a particular solution will prove useful and whether its benefits outweigh the associated implementation and operational costs. Test shops that enable retailers to try out innovative products and learn about emerging and existing digital services can enable retailers to overcome these difficulties.

11. Please rank the following training solutions that you think are most effective in helping small retailers (where 1= most effective).

	Publicly funded development of digital skills and awareness for small retailers
	Privately funded development of digital skills and awareness for small retailers
	Public-private jointly funded development of digital skills and awareness for small retailers
	Digital skills training and awareness for small retailers on a one-to-one basis
	Digital skills training and awareness for small retailers on a group or location basis

Provision of information on retail and/or digital trends

Small retailers often lack access to good quality information on the retail sector and in particular, digital opportunities and initiatives.

12. Please rank the following provision of information that you think are most effective in helping small retailers (where 1= most effective).

	Local authority/municipality improving access to and quality of information on digital opportunities and initiatives
	Trade associations improving access to and quality of information on digital opportunities and initiatives
	Local authority/municipality improving access to databases and analytical tools regarding trends in the retail sector and consumer behaviour
	Trade associations improving access to databases and analytical tools regarding trends in the retail sector and consumer behaviour
	Local authority/municipality improving access to easily understandable information regarding trends in the retail sector and consumer behaviour
	Trade associations improving access to easily understandable information regarding trends in the retail sector and consumer behaviour

Knowledge sharing and network development

The fragmentation of the small retailer sector limits small retailer's engagement in the formulation and implementation of policy initiatives. Small retailers also do not know where to find information or have opportunities to learn from other retailers' experiences.

13. Please rank the following improvements in knowledge sharing that you think are most effective in helping small retailers (where 1= most effective).

	Local authority/municipality developing partnerships/networks to facilitate knowledge sharing and dialogue among small retailers and relevant parties
	Trade associations developing partnerships/networks to facilitate knowledge sharing and dialogue among small retailers and relevant parties
	Small retailers developing partnerships/networks to facilitate knowledge sharing and dialogue among small retailers and relevant parties
	Neutral promoter developing partnerships/networks to facilitate knowledge sharing and dialogue among small retailers and relevant parties
	Creation of an online community platform to facilitate knowledge sharing and dialogue among small retailers and relevant parties

Any missing solutions?

14. Would you like to add any solutions missing from the previous questions? If so, please comment on their effectiveness.

Prioritisation

15. From the groups of solutions that have been identified in the previous questions, please rank the order in which you think the solutions to help small retailers should be prioritised (where 1= most urgent)

	Development of public policy and strategies that focus on small retailers and/or a particular urban and rural areas
	Actions that support local-level policy formation
	Improvements to the physical infrastructure
	Improvements to the digital infrastructure
	Actions that assist small retailers to develop digital tools and applications
	Provision of digital skills training
	Improving access to information on retail and digital trends
	Improving opportunities for knowledge-sharing and networking

Conclusion

We would also appreciate any other comments and feedback that you wish to make in regard to this research.

16. Would you like to add any other general comments?

17. Do you want to receive a report when available?

	No
	Yes, then please add your email address below:

Thank you for completing the survey.

2 List of interviewees

In the framework of our research we have conducted interviews with the following people.

Table 2 List of interviewees

Name	Organisation	Member State
Erwin Brandl	EBA	Austria
Sebastian Auer	Fashion shop	Austria
Stefan Oberhauser	Government of the region of Carinthia / Economic department	Austria
Jürgen Weinzinger	Optician	Austria
Roman Seeliger	WKO	Austria
Franz Tauber	WKO	Austria
Cornelia Weber	WKO	Austria
Hannes Kirchbaumer	WKO-Kärnten	Austria
Christine Müller	WKO-Kärnten	Austria
Hélène Raimond	Agence du Numérique – Digital Agency Wallonia	Belgium
Anabelle Kinet	cat2lion	Belgium
Cis Scherpereel	CIS	Belgium
Dominique Moraux	Dynamconsult	Belgium
Christophe Toye	Fairplace	Belgium
Marc Sibile	Member and president of the retailers in the city of Chimay, shop owner Lolipop.be	Belgium
Philip Meurisse	Shoes Verduyn	Belgium
Karel Van Eetvelt	Unizo	Belgium
Kim Mampaey	Unizo	Belgium
Davy Postelmans	VLAIO	Belgium
Wim Dons	Wine Shop Xpertvinum	Belgium
Raya Popova	General Secretary, Bulgarian Retail Association	Bulgaria
Ema Culi	Croatian Chamber of Commerce – Sector for Trade	Croatia
Sanja Smoljak Katic	Croatian Employers’ Association-Employers' Trade Association	Croatia
Leonidas Paschalides	Cyprus Chamber of Commerce and Industry	Cyprus
Konstantina Sophokleous	Ministry of Energy, Trade, Industry and Tourism	Cyprus
Jan Hrdina	Asociace českého tradičního obchodu	Czech Republic
Eva Svobodova	Asociace malých a středních podniků a živnostníků ČR	Czech Republic
Dan Jiranek	Svaz Mest a Obci	Czech Republic
Hana Rudysarova	Svazu obchodu a cestovního ruchu ČR	Czech Republic
Per Thye Rasmussen	Dansk Erhverv	Denmark

Name	Organisation	Member State
Pia Grabech	Erhvervsstyrelsen	Denmark
Géraldine Verbrugghe	Eurocommerce	EU
Nadège Dupont	Administration of the City of Paris (Chief cabinet of the person responsible for trade, craft and independent and liberal professions)	France
Shop owner	CEBO – a book store Paris	France
Pauline Cohadon	CoSto - Semaest	France
Emmanuelle Hoss	CoSto - Semaest	France
Fabien Ferreira	Facilyshop	France
Sophie Joanny	Shop owner Optique Joanny and president of the retailers' association Nice République	France
Jacky Menager	Start-up Next2U - AppsAre.Us Inc Associate Director	France
Thierry Sciasca	Store owner of ACTE 5	France
Manfred Rupprich	Bundesministerium für Wirtschaft und Energie Referat Handel und Werbewirtschaft (Federal Ministry for Economic Affairs and Energy)	Germany
Dimitra Gounari	Coordinator of the INEMY (Institute for Commerce and Services), Research and Documentation department	Greece
Dimitris Avlonitis	General Secretariat for Trade and Consumer Protection	Greece
Paris Koronaios	Greca (Greek eCommerce Association)	Greece
Aikaterini Kokla	Marketing Directorate of the National Fund for Entrepreneurship and Development	Greece
Nagy András	Director, Foundation for Enterprise Promotion (Zala county branch of MVA which is the (Hungarian Foundation for the Promotion of Entrepreneurship))	Hungary
Francesca Caciolli	Confcommercio Toscana – Coordinator of CAT (Center for Technical Assistance to members of Confcommercio)	Italy
Mauro Bussoni	Confesercenti, National Headquarters Rome – Secretariat General	Italy
Raffaella Zaccaria	Confesercenti Toscana - Part of the staff of CAT (Centre for Technical Assistance to members of Confesercenti	Italy
Gianni Masoni	Confesercenti Toscana – Responsible for Tourism	Italy
Paolo Isabettini	DajeMarche – Creator and coordinator	Italy
Cristiano Bruschi	iZoom.it – Input srl	Italy
Shop owner	Mem srl (Tools and precision machinery)	Italy
Massimo Libertino	Osteria dell'Aviatore	Italy
Stefano Romagnoli	Regione Toscana	Italy
Enzo Maria Tripodi	UnionCamere, Rome – Member of INDIS Centre of Research	Italy
Marco Ardimanni	UnionCamere Toscana	Italy
Davide De Crescenzo	Vetrina Toscana – Editorial Staff	Italy
Noris Krūzītis	Latvian Association of Food Retailers	Latvia
Katrīna Zariņa	Latvian Chamber of Commerce and Industry	Latvia
Raminta Krulikauskiene	SMEs policy division - Industry and Trade Department - Ministry of Economy	Lithuania
Ms Hanis	Chamber of Commerce	Luxembourg

Name	Organisation	Member State
Ms Merenne	Chamber of Commerce	Luxembourg
Astrid Augustsson	City of Luxemburg	Luxembourg
Thierry Lothum	CLC (employer's federation)	Luxembourg
Ms Darin	Retailers' Trade Union City of Luxembourg	Luxembourg
Ms Cynthia Darmanin	Artisan, makes vintage-looking teddy bears	Malta
Ms Deborah Attard	Artisan, selling craft jewellery online	Malta
Mr Warr	Commerce Department – Government of Malta	Malta
Denise Borda	Malta Communications Authority	Malta
Mark Falzon	ZNOTO hardware	Malta
Willem Buijs	chainels software	Netherlands
Sonja Fortuin	chainels software	Netherlands
Lony Scharenborg	de9straatjes.nl	Netherlands
Sander van Golberdinge	Detailhandel Nederland	Netherlands
L. Hilvering	Ik-Onderneem	Netherlands
J.M.T. Hautvast	Ministerie Economische Zaken	Netherlands
Rob Weiss	Platform de Nieuwe Winkelstraat	Netherlands
Shop owner	Reisboekhandel De Noorderzon	Netherlands
Shopkeepers	Stores in the 9 Streets	Netherlands
Maarten de Jong	Store Town and Country	Netherlands
Michal Polasik	consultant, retail technology and electronic payment	Poland
Andrzej Faliński	Polish Association of Trade and Distribution	Poland
Andreia Jotta	AEP, Associação Empresarial de Portugal (Business Portuguese Association)	Portugal
Pedro Magalhães	AEP, Associação Empresarial de Portugal (Business Portuguese Association)	Portugal
Rui Marques	Associação Comercial de Braga/ I shop Braga	Portugal
Daniela Pereira	Associação Comercial de Braga/ I shop Braga	Portugal
António Saraiva	CIP, Confederação Empresarial de Portugal (Business confederation in Portugal)	Portugal
Francisco Serra	Lisbon Shopping	Portugal
João Vasconcelos	Ministério de Indústria, Ministry of industry	Portugal
Adelia Mara Lima Porto	Porto Paralelo e-commerce platform	Portugal
Cristina Ionescu	Chamber of Commerce and Industry of Romania, Department of Strategy, Politics and Programs, Director	Romania
Daniel Boagiu	Chamber of Commerce and Industry of Romania, Department of Strategy, Politics and Programs, Information Analyst	Romania
Claudiu Vrinceanu	State Secretary in the Ministry of Economy, Trade and Relations with Business, the area of entrepreneurship, SME's, tourism and relationship with the business community (aired interview only)(interview requested, no reaction back from Ministry of Economy)	Romania
Peter Budinec	Cappon	Slovakia
Dana Chorogwická	Folkshop	Slovakia

Name	Organisation	Member State
Martin Mateáš	GAUDIN MONK	Slovakia
Alžbeta Lipovská	Ministerstvo Hospodarstva	Slovakia
Marko Benes	Slovenská Asociácia Pre Elektronický Obchod	Slovakia
Peter Blazecka	ZlavaDna	Slovakia
Zdenek Hoschka	ZlavaDna	Slovakia
František Ťapuš	Zväz obchodu a cestovného ruchu SR	Slovakia
Miran Rade	Chamber of Craft and Small Business of Slovenia (Secretary of the Small Retailers Section)	Slovenia
Bojanka Velepič	Ministry of Economic Development and Technology (Secretary at the Directorate for the Internal Market)	Slovenia
Mija Lapornik	Slovenian Chamber of Commerce (Executive Directro of the Slovenian Chamber of Commerce)	Slovenia
Branka Bjelica	Slovenian Chamber of Commerce	Slovenia
Concepción Díaz de Villegas Soláns	Area of Spanish government for equity, social rights and employment.	Spain
Miguel Ángel Pérez Heredia	Ayuntamiento de Murcia, Murcia city hall.	Spain
Teresa Lucas	Ayuntamiento de Albacete, Albacete city hall.	Spain
Soraya Mayo Alonso	Cámara de Comercio de España, Spanish Chamber of Commerce	Spain
José Andrés Sánchez Razola	Grocery store - Entre Col y Col.	Spain
Miguel Borrego	Herbalist Malva	Spain
Eduardo Elorriaga Bracho	Hermeneus World	Spain
Eva Pando Iglesias	IDEPA	Spain
Inés Seijo Martínez	IDEPA	Spain
Rocío Frutos Ibor	Ministerio de Economía	Spain
Magnus Gunnarsson	ESV (The Swedish National Financial Management Authority)	Sweden
Daniel Wiberg	Företagarna (The Swedish Federation of Business Owners)	Sweden
Andreas Svensson	HUI research AB (research based consultancy in retail and hospitality)	Sweden
Åsa Talamo	Näringsdepartementet (The Swedish Ministry of Enterprise and Innovation)	Sweden
Jan Persson	Tillväxtverket (Swedish Agency for Economic and Regional Growth)	Sweden
Lena Nyberg	Vinnova (Sweden's innovation agency)	Sweden
Chris Hurst	Clockwork City	UK
Tim Atkins	Cheltenham Borough Council	UK
Diane Savory	GFirst LEP	UK
Paul James	Gloucester City Council	UK
Matthew Hopkinson	LDC	UK
Polly Barnfield	Maybe	UK
Stephen Lydon	Stroud District Council	UK

3 Events participants

Below are listed the participants to each of the four regional workshops (Oxford, Madrid, Warsaw, and Lisbon), and to the Brussels Seminar:

Participants at the workshop in Oxford, 1 February 2017:

Name	Organisation	Member State
Andreas Pauer	Ecorys	AT
Andrew Phipps	CBRE	UK
Claudia Seiler	University of Oxford	UK
Clementine Valayer	Gartner	FR
Emily Knight	Marketing Gloucester	UK
Fabio Fulvio	Confcommercio Association	II
Ginny Fellows	Clarendon Centre	UK
Graham Jones	Oxford High Street Association	UK
Jason Smith	Marketing Gloucester	UK
Jim Hubbard	British Retail Consortium	UK
Jonathan Reynolds	University of Oxford	UK
Laurie-Jane Taylor	Oxford City Manager	UK
Leena Whittaker	European Commission	
Nicoletta Occhiocupo	Oxford Brookes University	UK
Ojay MacDonald	Association of Town Centre Managers	UK
Polly Barnfield	Maybe	UK
Richard Bradley	Farmers Market	UK
Richard Cuthbertson	University of Oxford	UK
Ruth Wilkinson	Oxford City Councillor	UK
Steve Dowling	Association of Convenience Stores	UK
Tom Morris	Oxford City Manager	UK
Tom Walburn	Oxford Castle Unlocked	UK
Wojcicech Piotrowicz	University of Oxford	PL

Participants at the workshop in Madrid, 7 February 2017:

Name	**Organisation**	**Member State**
Andreas Pauer	Ecorys	AT
Clémentine Valayer	Gartner	FR
Concepción Díaz de Villegas Soláns	Madrid – Area of Spanish government for equity, social rights and employment	ES
Eduardo Elorriaga Bracho	Hermeneus World platform (Mercado47)	ES
Gonzalo Nolte	Banco Caixa Geral España	ES
Guillermo González	Confederación de comercio especializado de Madrid (COCEM)	ES
Hélène Raimond	Agence du Numérique – Walloon Region	BE
Isabel Balbontín da Costa de Moraes	Badajoz – Area Strategy and Business Development	ES
Jesus Garcia de Madariaga	Universidad Complutense de Madrid	ES
Jorge Salguero García	Badajoz – Department of Innovation and EU projects	ES
José Andrés Sánchez Razola	Grocery store – Entre Col y Col. Part of Mercado 47	ES
José Guerrero Huesca	Confederación Española de Comercio - Spanish Retail confederation	ES
Julián Ruiz	Confederación Empresarial de Comercio de Bizkaia (CECOBI): Business Confederation of Commerce of Bizkaia	ES
Leena Whittaker	European Commission	
Lony Scharenborg	9straatjes Amsterdam community manager	NL
Luisa Álvarez Blanco	Asociación de detallistas de la pesca (Adepesca) - Association of fish retailers	ES
María Sánchez Ruiz	Federación de detallistas de la carne (Fedecarne) – federation of meat retailers	ES
Mario Cortes	Málaga – Deputy Mayor	ES
Miguel Borrego	Herbalist Malva part of Mercado 47	ES

Participants at the workshop in Warsaw, 9 February 2017:

Name	Organisation	Member State
Jadwiga Andrejczuk-Panasiuk	Metatron Jadwiga Andrejczuk-Panasiuk	PL
Miroslaw Antonowicz	Kozminski University	PL
Andrei Bunis	European Commission	
Janusz Cieszyński	Ministry of Development	PL
Andrzej Faliński	Polish Association of Trade and Distribution	PL
T. Gonsior	Kozminski University	PL
Michał Gruszka	Toraja	PL
Cristina Ionescu	The Chamber of Commerce and Industry Romania	RO
Maciej Januszewski	MAart Agency Ltd.	PL
Jeremi Jarocki	Ecorys	PL
Sebastian Jarzebowski	Kozminski University	PL
Izabela Kwietowicz	Evergreen	PL
Roelof-Jan Molemaker	Ecorys	NL
Barbara Oberc	Ecorys	SI
Nicoletta Occhiocupo	Oxford Brookes Business School	IT
Maciej Olczyk	Propharma sp z o.o.	PL
Mariusz Panasiuk	Polpan	PL
Andreas Pauer	Ecorys	AT
Wojciech Piotrowicz	University of Oxford	PL
Sławomir Pyciński	Agencja Rozwoju Mazowsza S.A	PL
Joanna Schulz-Kwiatkowska	Interpreter	PL
Edgard Skarżyński	Foundation Polonia Union	PL
Marcin Telakowiec	UM Warszawy, Biuro Polityki Lokalowey	PL
Leena Whittaker	European Commission	
Andrzej Wojciechowicz	FMCG Business Consulting	PL

Participants at the workshop in Lisbon, 21 February 2017:

Name	Organisation	Member State
Xavier Anderson	Clockwork City	UK
Manuel Aranha	City of Oporto	PT
Jose Brinquete	CPMPME (Portuguese Confederation of SMEs)	PT
Andrei Bunis	European Commission	
Clotilde Cavaco	IMPIE	PT
Richard Cuthbertson	University of Oxford	UK
Vasco De Mello	Confederação do Comércio e Serviços de (CCP)	PT
João Ferreira	European Parliament	PT
Isabel Francisco	Confederação do Comércio e Serviços de Portugal (CCP)	PT
Maria Guimarães	SBI Consulting	PT
Boris Hedde	IFH Köln	Germany
Christopher Hurst	Clockwork City	UK
Rui Marques	Associação Comercial de Braga/ I shop Braga	PT
Cristina Martínez	Ecorys	ES
Marta Miraldes	SBI Consulting	PT
Roelof-Jan Molemaker	Ecorys	NL
Florência Monteiro Dias	City of Sintra	PT
Maria João Morgado	CICS.NOVA (Interdisciplinary Centre of Social Sciences)	PT
Marta Nestor	Porto Paralelo	PT
Barbara Oberc	Ecorys	SI
Andreas Pauer	Ecorys	AT
Daniela Pereira	Associação Comercial de Braga/ I shop Braga	PT
Manuela Resende	City of Porto	PT
Carla Salsinha	União de Associações do Comércio e Serviços de Portugal (UACS)	PT
João Sande e Castro	Directorate General for Economic Activities	PT
Ana Saraiva	Directorate General for Economic Activities	PT
Leena Whittaker	European Commission	

Participants at the Brussels Seminar, 25 April 2017:

Name	Organisation	Member State
Roelof Jan Molemaker	Ecorys	NL
Richard Cuthbertson	University of Oxford	UK
Clementine Valayer	Gartner	FR
Andreas Pauer	Ecorys	AT
Karen Hayer	Ecorys	UK
Chloé Féré	Ecorys	FR
Maria Rehbinder	European Commission	
Andrei Bunis	European Commission	
Leena Whittaker	European Commission	
Paulina Matczak	European Commission	
Else Groen	Independent Retail Europe	
Elisabeth von Reitzenstein	Independent Retail Europe	
Alison Harvey	Irish Heritage Council	IE
Tara Buckley	Retail Grocery Dairy & Allied Trades Association	IE
Guy Douglas	Clockwork City	UK
Michael Van der Mynsbrugge	Commune of Berchem Saint Agathe	BE
Viviane Teitelbaum	Commune of Ixelles	BE
Laurent Chaftar	Commune of Schaerbeek	BE
Luc Hendrickx	UEAPME	
Hannes Kirchbaumer	Kirchbaumer Consulting	AT
Guylaine Bouquet-Hanus	Hous of Entrepreneurship Luxemburg	LU
Erwin Brandl	GUUTE Initiative	AT
Reinhard Stadler	GUUTE Initiative	AT
Eduardo Elorriaga	Hermeneus World	ES
Sophie Lombard	Confédération des Commerçants de France	FR
Hélène Raimond	Commerce connecté - Agence du Numérique - Walloon Region	BE
Davy Postelmans	Agentschap Innoveren & Ondernemen	BE
Corina Stefania Moise	Eurocommerce	
Ilya Bruggeman	Eurocommerce	
Veronica Favalli	Confcommercio	IT
Julien Bacq	ATRIUM Brussels	BE
Lony Scharenborg	de9straatjes.nl	NL
Fanny Lannoy	FairValue Corporate & Public Affairs	FR

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