

RESTART: Innovative Entrepreneurship Model

The Impact of COVID-19 on MSMEs

(RESTART PR2 T2.2 Output)

SPAIN Mapping Input

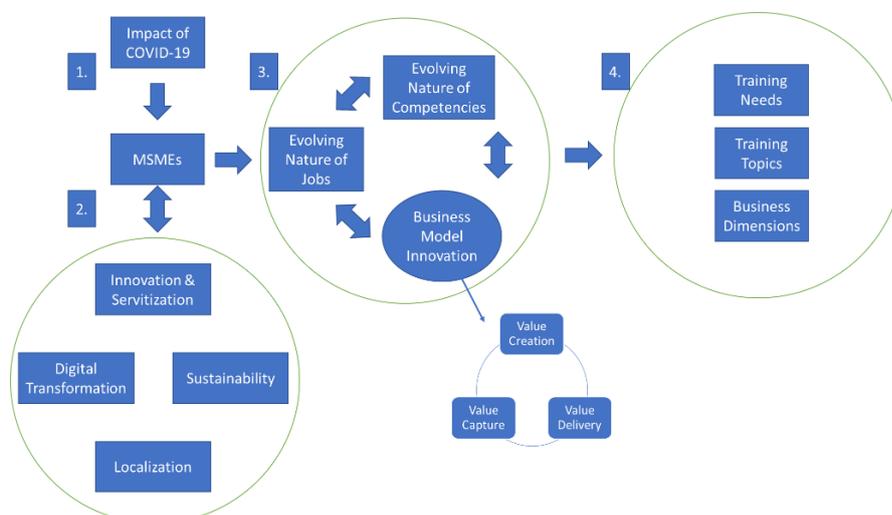
Introduction

The core of this mapping is based on the investigation of the impact of COVID-19 on MSMEs in Spain. It has been prepared by Internet Web Solutions as the secondary mapping output within the RESTART Project Result 2, Task 2.2 “Gauging pandemic impact on business operations”. The analysis is through the “VET lens” and is not aimed at collecting generic impact, but rather identifying the emergence of new and evolving needs for training, upskilling, retraining due to the impact of COVID-19 on MSMEs. The informed insight contained in this Mapping Input will be used for the next stages of the project, namely: a) PR2 Task 2.3 Match Innovative Biz Models and MSME needs, and b) PR2 Task 2.4 Define Evolving MSME Jobs in Post Pandemic.

Disclaimer

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The impact of COVID-19 on MSMEs: RESTART conceptual framework



Research questions:

1. How has COVID-19 impacted MSMEs?
2. What has been the impact of 4 megatrends on MSMEs?
3. What changes have occurred in business models, MSME's jobs, and entrepreneurial competencies?
4. How have these changes affected business dimensions, training needs, and training topics for growth and competitiveness?

Topic 1: Impact of COVID-19 on MSMEs

The review of secondary resources on the impact of COVID-19 on MSMEs in Spain revealed the following list of inputs:

- **Economic losses** – The Spanish Confederation of Business Organisations (CEOE, 2021) estimates the losses of Spanish companies in 2020 at 287 billion euros compared to 2019 due to the pandemic. It is important to bear in mind that according to the Spanish Government (2021), 99.9% of Spanish companies are MSMEs.
- **Discontinuation of enterprises** – The pandemic has led to a significant decline in the number of Spanish companies. Little more than a year after the onset of the crisis, there were almost 90,000 fewer companies: 52,344 had one employee, 20,639 had between 2 and 5 employees, and 15,219 had between 6 and 50 employees. (Fernández, 2021)
- **Most affected sectors** – The most affected sectors by the pandemic in Spain have been hostelry and tourism, transport, industry, retail, fair and congresses, and construction. However, other sectors have benefited from the situation and have grown: agriculture, e-commerce, telecommunications, finance and insurance, health and pharmaceuticals. (Velarde, 2021)
- **Financial vulnerability** – The pandemic has led to a lack of liquidity for Spanish MSMEs, which in 2020 had 13% more liquidity needs than in the previous year. However, income support fiscal policies (furlough schemes and deferrals) partially fulfilled these financing needs. (Blanco et al., 2021)
- **Improved digitalisation and a need for digital skills** – According to a study, 53% of Spanish MSMEs think that they have improved their level of digitalisation during the pandemic due to the digital shift (Calvo, 2021). However, there is still a need for digital skills training for Spanish MSMEs in areas such as cybersecurity, e-commerce, digital marketing or cloud platform management.
- **Employment** – 25.2% of MSMEs reduced their employment in 2020 compared to the previous year, and only 12.3% saw an increase. Micro and small enterprises were the worst performers in terms of employment (FAEDPYME, 2021). However, the situation has started to improve in 2021.
- **New opportunities** – Not all the effects of COVID-19 have been negative for Spanish MSMEs. On the contrary, new opportunities have been created for companies: 77% of internationally active Spanish companies are exploring new opportunities, and many other entrepreneurs are considering redirecting their investments to the industrial sector. (Fernández, 2021)

In general, the impacts of the pandemic on Spanish MSMEs have been negative due to the economic losses, starting with the Great Confinement that took place between March and June 2020, which paralysed the country's economic activity, and many business sectors had to cease their activity, especially in the hostelry and tourism sectors, key sectors for the Spanish economy. The economic losses resulting from this crisis caused a lack of liquidity in companies, which made them financially vulnerable, and the importance of financing, both public and private, for example, through the European Next Generation Funds, has been highlighted. However, while the pandemic has negatively affected the MSME economy and employment, certain sectors have seen growth in response to emerging telecommunications, health, e-commerce and agriculture needs. For example, those companies that had an online shop before the pandemic have been able to stay afloat, unlike those that only had physical shops. In addition, new opportunities have arisen for companies, which have gone hand in hand with training needs for employees, especially in digital skills. As a result, Spanish MSMEs will have to commit to digital transformation and open up to new markets, as the pandemic has highlighted the opportunities that new technologies bring to the business world.

Topic 2: Impact of 4 megatrends on MSMEs

The review of secondary resources on the impact of 4 megatrends on MSMEs in Spain revealed the following list of inputs:

- **Stagnation of innovation** – Only 11% of Spanish MSMEs increased their innovation budget in 2020, and 26% reduced it. Even though Spain has had good innovative potential, in 2019, 29% of MSMEs dedicated only 1-3% of their budget to innovation; 40% of MSMEs found innovation difficult, and 84% thought that innovation is not sufficiently supported. (Leyton, 2021)
- **Servitisation by sectors** – The sectors with the highest implementation of servitisation in Spanish manufacturing companies are the sectors related to energy (oil and its derivatives, natural gas), machinery, transport equipment, furniture, heavy construction, and textile industry. (Castellón Orozco, 2020)
- **The emergence of new programs** – E.g., “Kit Digital” is a programme financed by the Next Generation EU funds to promote the digitalisation of MSMEs and the self-employed as a contribution to the improvement of the Spanish productive fabric (La Moncloa, 2021). It is a public initiative to boost the digital transformation of Spanish MSMEs.
- **Acceleration of digital transformation** – The world underwent a digital transformation in eight weeks in 2020 that would normally have taken five years. A survey shows that 70% of Spanish companies believe they have accelerated the pace of the digitalisation of their operations. (Fundación Telefónica, 2021)
- **Re-localisation** – In Spain, the debate on industrial relocalisation has been reopened due to the rising cost of transport and the disruption of distribution chains. After the pandemic, the high dependence on third countries for many essential products such as healthcare materials has become evident, and therefore industry relocalisation to Spain has begun. (Vilaplana, 2021)
- **The increased importance of sustainability** – A report by the Organisation of Consumers and Users (OCU, 2019) highlights that 73% of Spanish consumers prefer to buy certain products for ethical or sustainability reasons. This is of great importance for Spanish MSMEs when offering their products and services.
- **Barriers to sustainable development of MSMEs** – Spanish MSMEs consider it costly to develop in a sustainable way and stress the need for public support to do so. Barriers to sustainable development include the lack of financial and human resources to implement sustainable strategies. (General Council of Economists of Spain, 2021)

Spanish MSMEs have a pending task mainly with innovation and sustainability. The 4 megatrends are about something that, if developed correctly, can provide a competitive advantage and bring a company greater profitability and efficiency. Nevertheless, for Spanish companies to overcome the existing barriers, they need greater support from public agencies (such as *Kit Digital* promoted by the Spanish Government to help with digital transformation), funding (such as Next Generation EU funds), or projects such as RESTART. In recent years, with the emergence of COVID-19, the importance of innovation, digital transformation, servitisation, localisation, and sustainability has been highlighted. In fact, all these elements could be considered as a set of characteristics that, at present, can lead to the growth of MSMEs. It is important to adapt companies' products and services to consumers in each market through localisation and bear in mind that consumers increasingly demand ethical and sustainable products. To achieve this, companies will have to train their employees and adapt their production methods to the four pillars, increasing their budget for innovation and focusing on digital transformation. A good way to do this would be to take the SDGs (Sustainable Development Goals) into consideration and integrate them into the company's strategy to have a roadmap that fits its activities.

Topic 3: Changes in business models, MSME's jobs, and entrepreneurial competences

The review of secondary resources on changes in business models, MSME's jobs, and entrepreneurial competences in Spain revealed the following list of inputs among the 3 subtopics:

Changes in business models

- **The digitalisation of processes** – As mentioned above, Spanish MSMEs have accelerated their level of digitalisation during the pandemic (Calvo, 2021). Due to the situation, companies have adapted by digitising many of their processes and adding new technologies to their daily activities, such as the cloud or increased cybersecurity.
- **The organisational model focused on resilience** – During the pandemic, the term “business resilience” was developed and has had to be applied by MSMEs to ensure their survival. To this end, companies have introduced an organisational model adapted to their situation and fostered close partnerships with their suppliers. (Cesce, 2021)
- **Zero-touch models** – One of the main changes has been the introduction of health and hygiene measures to counteract COVID-19, such as the use of masks and safety distances (Vera, 2020). Consequently, there has been a shift towards zero-touch business models; for example, restaurants have been promoting food delivery services over on-premise consumption.
- **Hybrid working model** – After the forced teleworking born during the Great Confinement, new work models have emerged that combine face-to-face work with remote working (Pérez, 2021). In this new work model, it is possible to bring talent into the company from anywhere globally, as it is possible to work from anywhere.
- **Importance of communication** – Communication has become essential with the pandemic, both internally among employees and externally with customers. 50% of MSMEs have expanded their customer contact methods (Salesforce, 2020). MSMEs have also integrated new internal collaboration tools for communication between employees.
- **Development of E-commerce** – One of the most relevant changes for Spanish MSMEs has been the adoption of e-commerce, as this has been a method for the survival of companies during the pandemic. Spain has 22.5 million online shoppers, with 72% of the Internet population between 16 and 70 years old. (Prieto, 2020)
- **The emergence of new trends** – The pandemic has also brought up new trends in terms of business model changes, which seek to reinvent the value proposition and transform the way it is delivered. An example of this could be the reorientation of fast fashion towards the circular economy or restaurants implementing new home delivery systems. (Riera, 2021)

Changes in MSME's jobs

- **Most in-demand training** – According to the Spanish Chamber of Commerce (2022), in the post-covid environment, the most demanded training is Vocational Training (49%), while higher education is demanded by 23.5%. 56.1% of companies think that the most in-demand professionals in the future will be those related to the technological field.
- **Most in-demand soft skills** – Time management, teamwork, and creativity are among the most in-demand soft skills in the post-covid era (Spanish Chamber of Commerce 2022). Lifelong learning capability, growth mindset, motivation, empathy, and active listening skills are also key in the post-covid era (Ticpymes, 2020).
- **Most in-demand hard skills** – Today, the most in-demand technical skills are digital skills. During the pandemic, workers had to use digital tools for file storage and transfer, online communication, personal organisation, time management, cybersecurity, online collaboration, and presentations. (Peláez, 2021)
- **Upskilling** – 57% of MSME employees in Spain have had to acquire new job skills during the pandemic, including digital skills, cybersecurity, health and wellbeing, data analytics, and sales.

Most of the training in these skills was provided by the companies themselves, but also on the employees' initiative. (Peláez, 2021)

- **Reskilling** – According to The Future of Jobs Report by the World Economic Forum (2020), 50% of all employees will need reskilling by 2025, and 40% of current workers' core skills are expected to change in the next 5 years. This reskilling will be related to the jobs of the future and automation.
- **Job demand** – The growing job demand in the coming years will be in data analytics, AI and machine learning, Big Data, digital marketing, software and applications development, and process automation. On the other hand, decreasing job demand will be mainly in positions with the possibility of automation, such as administration. (World Economic Forum, 2020)

Changes in entrepreneurial competences of MSMEs' owner-managers

- **Challenges for entrepreneurs** – If we put together the pieces of what we have read above, we can find clear challenges for new and established entrepreneurs. It will be very important that they can adapt to the changes that are happening faster and faster, find opportunities, carry out the digital transformation and cope with globalisation.
- **Required skills for managing MSMEs** – In the new era, the most in-demand skills for MSMEs' owner-managers are leadership and self-leadership, emotional intelligence, strategic vision, creativity and innovation, communication skills, motivation and curiosity, and empathy. (Adecco Institute, 2020)
- **Emphasis on wellbeing** – During the pandemic, it has been possible to focus on the importance of workers' physical and mental health. An important task for MSME managers will be to look after the employees' wellbeing and their own wellbeing through a scheme that promotes a work-life balance between professional, personal, and family life. (Gobertia, 2021)
- **Spotting further opportunities** – Entrepreneurs should be able to see the opportunities in their environment and use them beneficially. They will have to be able to analyse the possibilities offered by public and private funding, such as the Spanish Government's SME boost (2021) or the Next Generation EU funds.
- **Sustainable growth and related opportunities** – Sustainability is one of the 4 megatrends that have gained ground and importance in recent years. Managers must have skills and knowledge to enable them to take advantage of the opportunities offered by sustainability to achieve sustainable growth, for example, by exploiting the circular economy. (Europa Press, 2022)
- **Increased emphasis on resilience** – MSMEs' owner-managers should be able to establish and adopt mechanisms to deal with the challenges and difficulties that may occur beyond COVID-19. Resilience is one of the main characteristics present in the "new normal", which will help companies survive crises and reduce the chances of failure. (International Trade Center, 2020)
- **Innovation competences** – Innovation is a pending issue for Spanish MSMEs but presents an enormous opportunity. Therefore, leadership that fosters innovation in a company can improve its competitive position in the new normal.

The pandemic has brought about many changes in the business environment in Spain, particularly in MSMEs, which are usually a step behind in terms of digitalisation compared to large companies. During the pandemic, companies have been forced to digitalise many of their processes or change the way they deliver the value of their products or services and adapt their business models to more resilient ones. The introduction of teleworking to MSMEs was particularly noteworthy, even though the majority of companies returned to the traditional working model after the lockdown, it has been partially maintained in many others as an alternative that had not been considered before. The general profile of the worker most in demand by MSMEs has become that of a person with a technical professional background, the ability to manage time and work in a team, and digital skills in collaborative and file management tools. Owner-managers of MSMEs that need good leadership and strategic vision, social communication skills, empathy, and the ability to motivate their workers stand out in this new era.

Topic 4: Business dimensions, training needs, and training topics

The review of secondary resources and previous findings for Spain revealed the following list of recommendations for business dimensions, training needs, and training topics.

Business dimensions

- **Formulation of strategies and objectives** – Understanding the types of strategies and how to formulate them can help improve the strategic thinking and vision of MSMEs (SMART goal setting, product/service strategies, pricing strategies, cost reduction, promotion strategies, customer segmentation,...).
- **Information management** – Know what resources are available to optimise information management in a company, e.g., through the cloud (Google Drive, OneDrive...), CRMs or ERPs. In such a volatile and uncertain environment, it is important for companies to always have the necessary information to be able to carry out the decision-making process.
- **E-commerce** – E-commerce has been a lifesaver for many MSMEs during the pandemic. A guide on how companies can enter e-commerce will be a useful tool for those companies that have not yet taken the step to offer their products or services online, allowing them to reach a large number of customers.
- **Internal communication and collaboration** – Showing MSMEs different tools available for collaboration and teamwork (Asana, Trello, Google Workspace, Miro, Slack, etc.), videoconferencing (Zoom, MS Teams, Discord, etc.), or remote work (Teamviewer, Anydesk, Google Remote Desktop, etc.).
- **Communication with customers** – A guide on how to effectively engage with customers in the post covid era, using social media according to the target group (Instagram, Twitter, Facebook, Tik Tok...), social media management applications (Hootsuite, TweetDeck...), and content creation tools (Canva, Picmonkey...).
- **Funding** – Many companies are unaware that they are eligible for many types of funding from the European Union, such as through the Next Generation EU funds recovery scheme. It would be useful to collect information on programmes that MSMEs can access to finance their digital transformation or sustainability strategies.
- **Employee wellbeing** – Providing information on the different strategies to be followed to improve and maintain the wellbeing of employees, increase their motivation, and promote a good work-life balance. Happy employees will also improve their productivity and their value to the company.

Training needs

- **Digital skills** – Basic digital skills are necessary to make use of online collaborative tools, cloud storage management, e-commerce for both employees and owner-managers of MSMEs.
- **Cybersecurity** – In addition to digital skills, at least a basic knowledge of cybersecurity is necessary to maintain the confidentiality and integrity of MSME information, which can be compromised and cause serious problems.
- **Soft skills** – Due to the high demand from companies, it is necessary to enhance soft skills such as time management, teamwork, creativity, problem-solving, growth mindset, lifelong learning, and active listening.
- **Leadership** – Good leadership by MSMEs' owner-managers will help improve the company's competitiveness and the motivation of the employees. It would be useful to present the different leadership styles and how they can be applied in different situations and learn how leadership can motivate employees and increase productivity.
- **Decision-making and brainstorming process** – Following guidelines when making decisions and creating new ideas would allow companies to boost their ability to survive in times of crisis.

In a VUCA environment (Volatility, Uncertainty, Complexity, Ambiguity), decision making is vital.

- **Funding access** – Most MSMEs are not aware of the financing alternatives available to them at European, national and local levels. Given that lack of liquidity has been a problem during the pandemic, it is important to provide knowledge in this area.
- **Awareness about sustainability** – There is still little awareness among Spanish MSMEs of the opportunities that sustainability brings and how sustainable strategies can be implemented to improve the company's competitiveness.

Training topics

- **Improving the organisation's competitiveness** – This topic would cover, among others, the formulation of strategies and objectives, information management, e-commerce, and communication with customers to improve the competitiveness of the business.
- **Innovation and spotting opportunities** – The topic includes how to generate innovative ideas by identifying opportunities in the environment and how to carry out the innovation process. MSMEs need to learn about examples of companies with innovative ideas and how they have implemented them.
- **Business resilience and adaptability in times of crisis** – The topic covers how to make a business model more resilient to adapt to crises or difficulties.
- **Collaborative working** – How to improve teamwork, what tools are available for good online collaborative work, and the benefits of working together.
- **Cybersecurity at work and in remote work** – The topic covers safe work on the Internet, both in the office and remotely to not jeopardise the company's security.
- **Integrating sustainable strategies** – This topic covers different sustainable strategies, how to leverage the circular economy in business, and best practices of companies applying sustainability.
- **Funding alternatives for MSMEs** – What types of funding are available at the European and national levels, the requirements and how MSMEs can access funding.

After an analysis of how the pandemic has impacted Spanish MSMEs, the impact of the 4 megatrends – Innovation & Servitisation, Digital Transformation, Localisation and Sustainability – and the changes that have taken place in recent years with respect to business models, jobs and the entrepreneurial competences of MSMEs' owner-managers, we have concluded that the most important issues to improve the competitiveness and growth of MSMEs in the post-covid era are those we have defined in the previous section. On the one hand, it is important to enhance companies' own competitiveness through training in business knowledge, such as strategies or interaction with customers. On the other hand, to enhance megatrends, training is included on how to carry out the innovation process and implement sustainability in business. Furthermore, collaborative work is vital in the post-covid era, and it is necessary to know what tools are available for this, combined with knowledge of cybersecurity. Finally, knowing the funding alternatives that MSMEs can access will help with the problem of financial vulnerability and allow them to carry out their digital transformation or implement innovative and sustainable ideas.

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