Capitalising +RESILIENT in Alentejo, Portugal

POLICY BRIEF

March, 2022

1. Executive Summary

This document outlines the main project results considered useful for capitalisation purposes by the stakeholders of the +RESILIENT project in the Alentejo Region, Portugal. It also presents the capitalisation recommendations that emerged from the debate that took place in two mainstreaming meetings following the participatory and 4-helix approach that geared the development of the project.

The main conclusions of the debate on project results and lessons can be summarised as follows:

✓ Cooperation is essential for social innovation: networking/cooperation between stakeholders, public-private cooperation, adopting the 4-helix model.

✓ There are different visions and strategies to strengthen social ecosystems in each region involved in the project, which stem from the characteristics and specificities of local economies.

✓ The forms of intervention by the different actors are diverse, but in most cases public support is essential to sustain the innovation processes.

✓ Innovation processes require the adjustment of professional profiles and the reinforcement of personal and professional skills.

✓ There is always a need for political support (incentive public policies) to promote social innovation.

✓ Social innovation is transversal to any sector of activity.

✓ The main challenges of social digital innovation are found in "building bridges" between Social Needs & Digital Transition and Public Policies & Sharing Economies.

The stakeholders of the Alentejo Region agreed on the following capitalisation recommendations:

1) Preserve and consolidate the cooperation ecosystem and inter-institutional relationships built throughout the project.

2) Strengthen network cooperation for social innovation and define solutions to enable the transfer of project learnings.

3) Review professional profiles and skills regarding the provision of social services

4) Strengthen the Social Compass Platform (Bussola Social / BS)

5) Support to capitalisation initiatives

2.   Introduction

Capitalising on the knowledge created in +RESILIENT is a resolution and a responsibility taken by the stakeholders that have been involved in the development of the project in the Alentejo Region. Capitalisation aims to enhance the value created in the project, through:

- ✓ Taking profit of the added value created by the project ecosystem of relations.

- ✓ Increasing the value of the learning processes developed in the project.

- ✓ Continuing the knowledge dynamics created within the project.

This memorandum outlines the main results that the stakeholders considered useful to capitalise on, either by including them in the innovative practices of the various relevant entities, or by deepening the analysis and producing further knowledge.

The capitalisation recommendations presented here emerged from the debate that took place in two mainstreaming meetings focused on the project main activities and results. These meetings followed the 4-helix approach on which the project development had been grounded, combining the perspectives and aims of different types of stakeholders.

3.   Overview of the problem

The analysis of investment projects that took place along the programming period 2014-2020 in Alentejo, in the Social Economy sector, discloses that only 3% of those investments tackled the incorporation of "Technologies", or the development of new "Specialised Services". It is therefore evident that integration of innovative knowledge and technology transfer is not perceived as a priority by the regional Social Economy actors.

In Alentejo, +RESILIENT was focused on the social care sector and tried to contribute to build innovative solutions and technology incorporation, addressing in particular digitalisation processes. The implementation of the Pilot Action "Bússola Social / Social Compass" was instrumental for this purpose and addressed the development of an interactive digital tool mapping existing public and private social services in Central Alentejo. The digital tool is available on an Internet platform, for searching and contacting social care providers, and it is entirely based on Open Data (OD) and Public Service Information (PSI), collected from several sources.

Digital tools facilitate interaction in multiple ways. The digital tool created allows different possibilities for active networking and collaboration:

- ✓ Provides guidance to citizens seeking for any kind of social assistance;

- ✓ Helps social economy organisations to cooperate and interact on the basis of complementarities and synergies, increasing efficiency;

- ✓ Facilitates monitoring, coordination and policy adjustment by policy makers and other public authorities;

✓ Provides a knowledge base for social researchers.

The lessons learned along the project implementation allow to identify the main difficulties, when trying to tackle digital and social innovation and to use OD/PSI:

✓ Effective involvement of stakeholders based on 4-helix coverage is critical, to combine and cross-check different visions and skills; in particular, it is essential to join IT knowledge with knowledge on the complexity of social services.

✓ Contents and reliability/quality of OD/PSI is variable and most PSI is not available in appropriate formats; this requires consistency check of datasets and conversion of PSI into suitable formats, whenever possible.

✓ Lack of motivation of private social care organisations to regularly and actively participate in the building and maintenance of digital tools; this requires the identification of motivation factors, that is to say, effective benefits for the social organisations resulting from digitalisation and sharing of information.

✓ Low level of digital literacy of some segments of citizens, constraining the full use of digital tools; this requires training to be provided by social organisations, to increase digital competencies, with a focus on more vulnerable groups.

4. Examination of the project results

The main activities and results of the project were categorised into 5 topics. These topics were discussed in the stakeholders' meetings to evaluate results and assess the potential for further development to ensure continuity and mainstreaming integration. The following points were discussed:

1) The + RESILIENT approach: Social Vocation and Responsiveness Clusters (SVRC) / 4 helix approach.

   ▪ Adopting the concept and materializing it in the social policy tools.

   ▪ Correspondence with existing networks and approaches.

2) The + RESILIENT analysis of skills: competencies for social digital innovation.

   ▪ The need to consider new competencies and abilities for social care.

   ▪ The need to revise professional profiles to meet the skills necessary for social innovation and digital transition.

3) The +RESILIENT study visits: cases for reflexion.

   ▪ Visions and strategies to strengthen social ecosystems, transferring possibilities.

   ▪ The role of different actors.

   ▪ Main challenges in social digital innovation.

4) The + RESILIENT pilot actions: diversity of objectives and impacts.

- Networking and cooperation.

- The use of Open Data.

- Policy support.

- Social innovation in different activity sectors.

5) The + RESILIENT available resources: Open Social Clusters Platform

- Overview of the resources available through the platform.

The main conclusions of the analysis can be summarised as follows:

✓ Cooperation is essential for social innovation: networking/cooperation between stakeholders, public-private cooperation, adopting the 4-helix approach.

✓ There are different visions and strategies to strengthen social ecosystems in each region involved in the project, which stem from the characteristics and specificities of local economies.

✓ There are different forms of intervention by the different actors, but in most cases public support is essential to hold the innovation processes.

✓ Innovation processes require the adjustment of professional profiles and the reinforcement of personal and professional skills.

✓ There is always a need for political support (incentive public policies) to promote social innovation.

✓ Social innovation is transversal to any sector of activity.

✓ The main challenges for social digital innovation are found in "building bridges" between

- Social Needs & Digital Transition

- Public Policies & Sharing Economies

5. Policy Recommendations

Capitalising on the main results and lessons of the project entails the following assumptions as a starting basis:

✓ Social innovation simultaneously involves processes (how) and results (products or services) and applies to any sector of activity.

✓ Actions for social innovation require:

- Strong stakeholder participation to ensure ownership of results.

- Training and acquisition of new skills.
- Incentive public policies.
- Solutions for monitoring and evaluating the sustainability of interventions.

To move from the experimental activities of the project to actions aiming the mainstreaming of results or lessons learned, the following themes were identified on a capitalisation perspective.

1) Preserve and consolidate the cooperation ecosystem and inter-institutional relationships built throughout the project

The system of relationships created for the development of the +RESILIENT activities, namely through the operation of the Regional Stakeholders Group and Policy Coherence Group, proved useful and effective in implementing the initiatives, facilitating the creation of bridges between different institutions and areas of knowledge, favouring a more assertive approach.

Therefore, it is recommend the continuance of this type of approach, involving strategic actors in the 4-helix model, contributing to generate innovative ideas/services and undertake mobilizing interventions, under the coordination of CCDR Alentejo (Commission for Regional Development of Alentejo).

This structure may operate informally, or with an institutional framework established in a perspective of cooperation and shared responsibilities, to support the implementation in the Region of the various public policies concerning social innovation. In either option, the creation of sub-groups or thematic forums will be a good solution to operationalize interventions in specific domains.

2) Strengthen network cooperation for social innovation and define solutions to enable the transfer of project learnings

The objective of promoting social innovation in a networking context, based on the concept of Social Vocation and Responsiveness Clusters (SVRC), suggests the promotion of a regional network of Creative Hubs (incubators and other support structures for social innovation existing in the region).

The transfer of knowledge created by the project to municipalities is also a promising area of intervention. It will allow the appropriation of results by local actors, the proximity to citizens and the empowerment of municipal institutions. Mechanisms should be established for the effective development of this process, possibly in combination with the initiatives to promote the Social Compass indicated ahead in action #4.

3) Review professional profiles and skills regarding the provision of social services

Strengthening social innovation processes, along with the challenges of digital transition currently faced by the social economy sector, suggest the need to rethink professional profiles and skills regarding the provision of social services.

The stakeholders recommend such initiative to be conducted by an inter-institutional working group (4-helix model), to carry out the analysis of professional profiles and competences, and outline recommendations for their redefinition and adjustment. The results obtained must be reported to ANQEP – National Agency for Qualification and Vocational Education, aiming to introduce possible adjustments in the National Qualifications Catalogue, in the field concerning the qualifications for "Community Services".

4) Strengthen the Social Compass Platform (*Bussola Social / BS*)

The Social Compass Platform (BS) is one of the most relevant products of the project in the Alentejo Region. With a local and participatory origin, both in terms of content and in its development process, it is a product to be valued, namely through the following guidelines.

Consolidation

The principles underlying the creation of the BS assume the active participation of social service providers to update their own data in the platform, to guarantee the consistency of the information displayed.

However, adherence to updating procedures has been insufficient, suggesting the need for actions to promote the BS among social service providers. These actions could be carried out in collaboration with the municipalities, as leaders of the municipal social networks.

Promotion actions should include mechanisms (e.g. surveys) to assess the perception of the usefulness of BS by the service providers and to identify the motivations that may contribute to increase adherence. This way, it will be possible to subsequently establish a framework to ensure the benefits expected by the organisations involved in the updating process and to ensure their collaboration.

Territorial enlargement

Extension to other sub-regions, to gradually cover the entire Alentejo Region is recommended, involving the inclusion of new datasets by NUTS3 or by district.

Content expansion and diversification

Addition of information on other relevant thematic areas is also recommended, creating new sections on the platform, and expanding the target audiences.

In this domain, the interventions identified as the most interesting concern the provision of information targeted to the social care professionals, in coordination with the results of the above-mentioned action #3.

Therefore, recommendation is for the creation of a new a section dedicated to the profiles and skills of professionals in the sector, and to the promotion of training and acquisition of new skills. The content of this new section should include:

- Links to relevant professional profiles in the National Qualifications Catalogue.

- Information on the training offer, available at local and regional level, aimed at managers and workers in social services (including, for example, training courses within the scope of the *Valorizar Social* Programme, which aims to respond to new demands in management and finance, leadership and innovation).

Regarding content diversification, coordination with other interventions related to the digital transition of companies (e.g., Digital Commercial Neighbourhoods), or interaction with initiatives in other sectors of activity (e.g., Évora European Capital of Culture 2027) should also be considered, if these initiatives are materialised in Alentejo Central.

Integration/interoperability with other platforms

Other digital platforms are being developed in the Region (e.g., Network for Access to Services of General Interest in Alentejo; T-Invest Project). The possibility of integration/interoperability of BS with these platforms should be assessed, considering that they share common objectives regarding networking and provision of useful information to citizens or companies.

5) Support to capitalisation initiatives

It is essential to ensure public co-financing solutions for the development of +RESILIENT capitalisation actions, particularly as the proposed actions are in convergence with the strategic programmatic options established for the future in the Region.

In addition to other possible sources of funding, namely the *Portugal Inovação Social* initiative, reference is made to the Alentejo Regional Operational Programme for the period 2021-2027, which will include funding options aiming at innovation and social experimentation that may accommodate the project capitalisation initiatives.

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