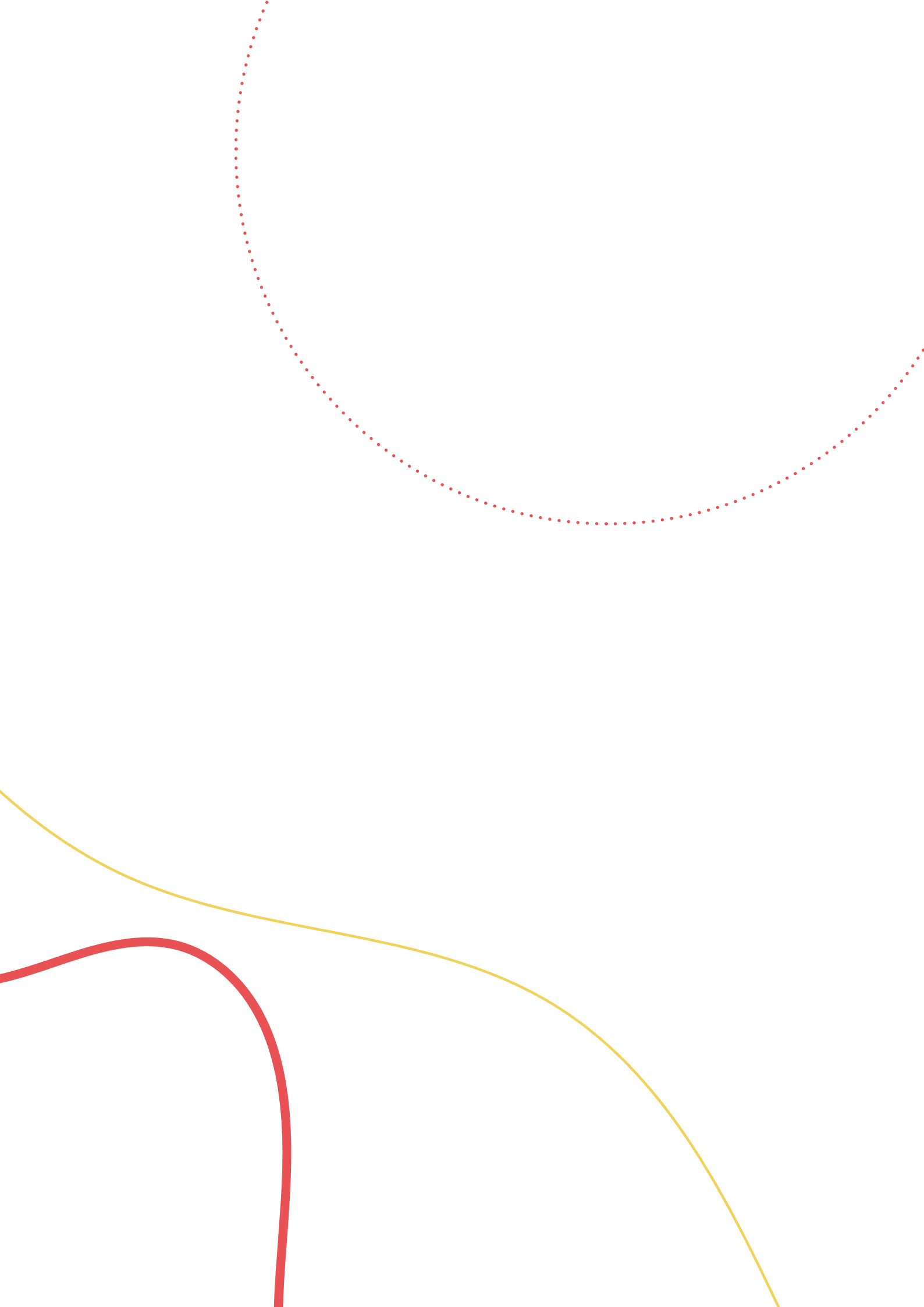


European  
Commission

# Social Experimentation

A practical guide for project promoters

*Social Europe*



## EUROPEAN COMMISSION

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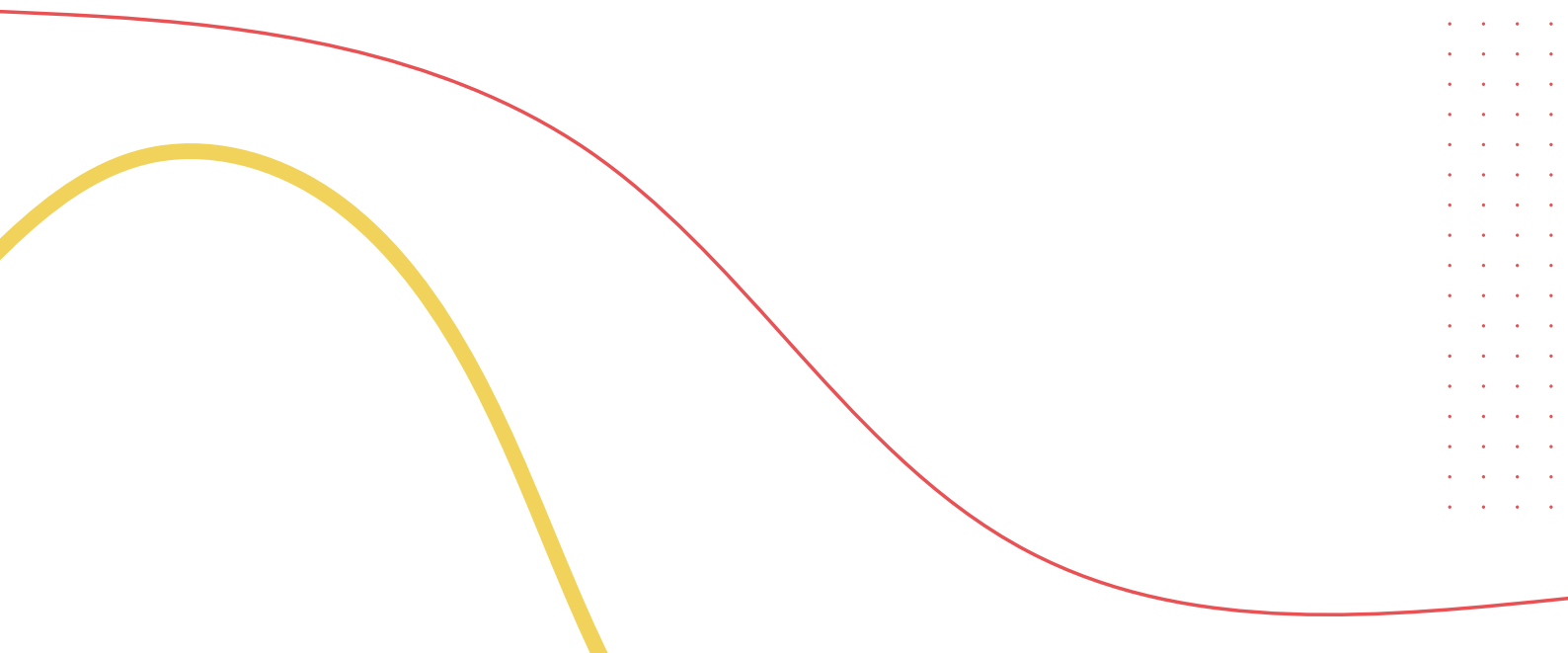
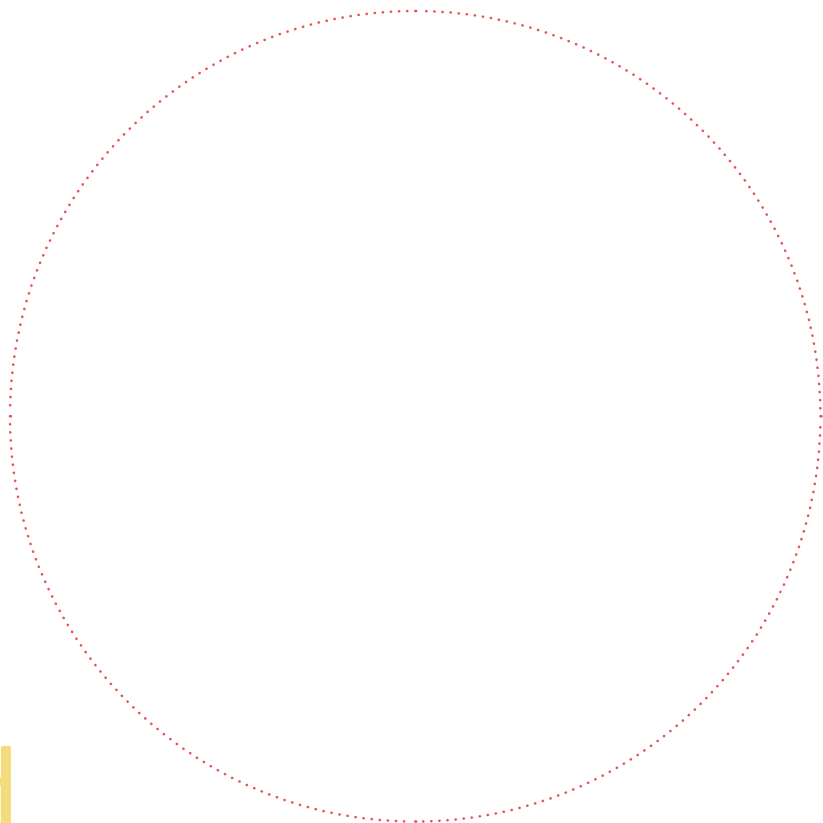
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# Foreword





We live in a rapidly changing world. The transition to a low carbon and more digital economy, demographic changes, the COVID-19 crisis and migration issues are examples of trends and events which are currently transforming and challenging the world of work, education and training and social services.

In responding to these challenges we need new ways of doing, which put citizens in the centre of action. We need social innovations: solutions which are social in their ends and in their means.

The European Union is doing its part in promoting social innovation. What is a common practice in one territory can be new and innovative and bring about social change in another. This is why the EU supports mutual learning and cooperation between social innovation stakeholders across Member States. In the field of employment and social affairs, this cooperation has now resulted in two pragmatic and useful guides:

- **Social Experimentations: A practical guide for project promoters**

This guide supports future EaSI project promoters preparing social experimentation proposals during the 2021-2027 programming period. It can also be useful for other stakeholders, notably those responding to ESF+ national and regional calls on social innovation.

- **Scaling up Social Innovations: Seven steps for using ESF+**

This guide looks at the social innovation from the perspective of scaling-up. It helps ESF Managing Authorities to design calls for proposals and other initiatives which aim at making a good use of already existing social innovations. This can ultimately help to reform and modernise policies and practices.

These guides complement each other and will walk you through the whole process of social innovation: from identifying social challenges to developing innovative solutions, to demonstrating their potential and finally helping to roll out the most convincing models in larger scale.

Delivering on the potential of social innovation is something that no organisation can do alone. On the ground, it will take a concerted, collective effort of national, regional and local authorities, of cities, of civil society, academia, social economy, business and social partners. Together, they have the finger on the pulse of our communities.

We believe the two guides will help the whole range of stakeholders to engage together for a society and economy that work for people.

European Commission,  
Directorate-General for Employment, Social Affairs and Inclusion

*Ruth Paserman*, Director  
Funds, Programming and Implementation

*Katarina Ivanković Knežević*, Director  
Social Rights and Inclusion



## Abbreviations

ACRONYM	DESCRIPTION
<b>AMIF</b>	Asylum, Migration and Integration Fund Programme
<b>CoP SI</b>	Community of practice on social innovation
<b>COSME</b>	EU Programme for the Competitiveness of Small and Medium-Sized Enterprises
<b>DG EMPL</b>	Directorate-General for Employment, Social Affairs and Inclusion
<b>EaSI</b>	EU Programme for Employment and Social Innovation
<b>EC</b>	European Commission
<b>ESCF</b>	European Social Catalyst Fund
<b>ESF</b>	European Social Fund
<b>ETS</b>	European tracking systems
<b>EU</b>	European Union
<b>MA</b>	Managing Authority
<b>MS</b>	Member-States
<b>NGO</b>	Non-governmental organisation
<b>OP</b>	Operational Programme
<b>PES</b>	Public employment services

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# A Guide to Support Social Innovation Project Promoters

## WHY THIS GUIDE?

Social innovation and social experimentations are more than ever needed to find innovative ways to tackle our contemporary societal challenges, such as climate change, environment protection, social and economic inequalities and poverty, demographic issues and migration trends, and the consequences of the COVID-19 pandemic.

**During the 2014-2020 programming period, the EaSI programme<sup>1</sup> provided financial support to 35 projects to test social and labour market policy innovations** before being implemented at a larger scale, as well as to build up the main actors' capacity to design and implement social policy initiatives. Some great achievements have been acknowledged but more can be done to improve their impact on the policy field and their upscaling in order to benefit more people.

The social experimentation approach – combining social policy experimentation, mainstreaming and upscaling – remains valid for the new 2021-2027 period. It can be further improved through the enhanced support to social innovation provided by the EU's biggest funding scheme investing in human capital, the European Social Fund Plus (ESF+)<sup>2</sup>. Social innovation and social experimentation will be supported in three complementary ways, under shared, direct and indirect management, increasing potential synergies between the various strands of ESF+. This new legal and financial landscape offers more opportunities to fund, transfer and upscale successfully tested social experimentations.

This guide aims to contribute to turning these opportunities into reality by providing a better practical understanding of social innovation and social experimentation as well as guidance for future project promoters preparing their social experimentation proposals.

## WHO IS THIS GUIDE FOR?

**This practical methodological guide aims to support practitioners**, primarily future EaSI project promoters preparing a social experimentation proposal in the 2021-2027 programming period. However, it can also be useful for other stakeholders, notably those responding to ESF+ national and regional calls on social innovation under shared management.

**In addition, this guide can raise awareness of policymakers and funding organisations at all levels** (EU, national, regional and local), in particular ESF+ Managing Authorities, about the value of social experimentation. They can use the results of already successfully tested social experimentations or design and launch new specific calls to test innovative solutions addressing their policy needs, which may help avoid some failures and associated costs.

This should improve the design of policies, programmes, calls and funding mechanisms to support social innovations and social experimentations.

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1 [REGULATION \(EU\) No 1296/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL](#) of 11 December 2013 on a European Union Programme for Employment and Social Innovation ("EaSI") and amending Decision No 283/2010/EU establishing a European Progress Microfinance Facility for employment and social inclusion.

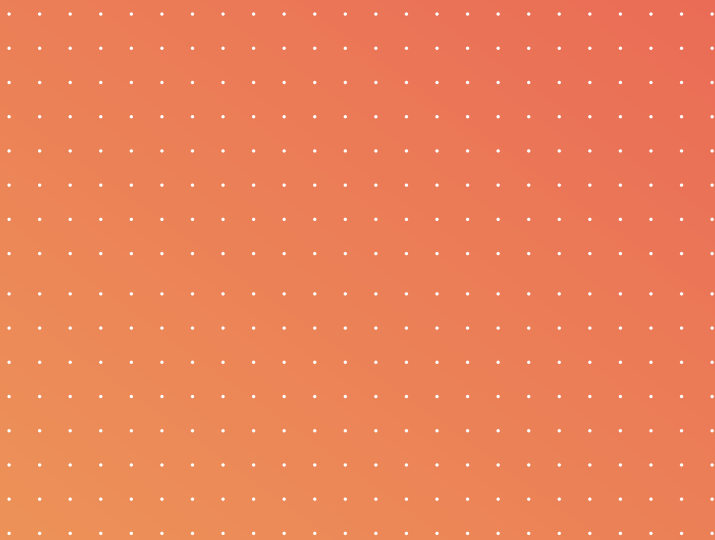
2 [REGULATION \(EU\) 2021/1057 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL](#) of 24 June 2021 establishing the European Social Fund Plus (ESF+).

## WHAT IS IT ABOUT?

**This guide is designed to support the preparation phase of a social experimentation project notably those to be funded by the EaSI strand of ESF+ in 2021-2027.** Although reality always differs from plans, a thorough planning covering all social experimentation dimensions ensures a smooth implementation, better chances to achieve positive results, to anticipate possible risks and adapt to deviations. It provides practical information from the 2014-2020 EaSI projects and current literature to better understand what characterises social innovation and social experimentation (section 1) as well as guiding questions illustrated by projects examples, tools, models and methods used, along with tips from previous EaSI projects in a “peer-to-peer” spirit (Sections 2 to 5).

## HOW WAS THE GUIDE PRODUCED?

**This guide has been developed through a co-creation process** engaging all 2014-2020 EaSI project promoters, as well as some ESF Managing Authorities from the ESF Community of Practice on social innovation, applying the user-centred approach commonly used in social innovation to ensure it meets the needs of EaSI project promoters. The analysis of existing EU and national literature, guides and similar resources, combined with the assessment of all 2014-2020 EaSI projects informed the process and the guide preparation.



# Introduction to Social Innovation



# Introduction to Social Innovation

## 1. AN IMPROVED SOCIAL INNOVATION ECOSYSTEM AT EU LEVEL

Many complex changes such as globalisation, the transition to a low carbon economy, demographic evolution, the shift towards a digital society, migration trends are already shaping Europe’s future and translate into new challenges and opportunities for the world of work, education, training and social services. Social innovation, developing new solutions to tackle unmet social needs, is often mobilised in times of crisis as shown by the BEPA Report<sup>3</sup>.

Social innovation and social experimentation are also transformative, with the capacity to unlock existing potentialities and to produce sustainable and systemic positive changes, based on their essential aim of creating social value for all. Important results have been achieved, but social innovation and social experimentation potential has not yet been fully tapped.

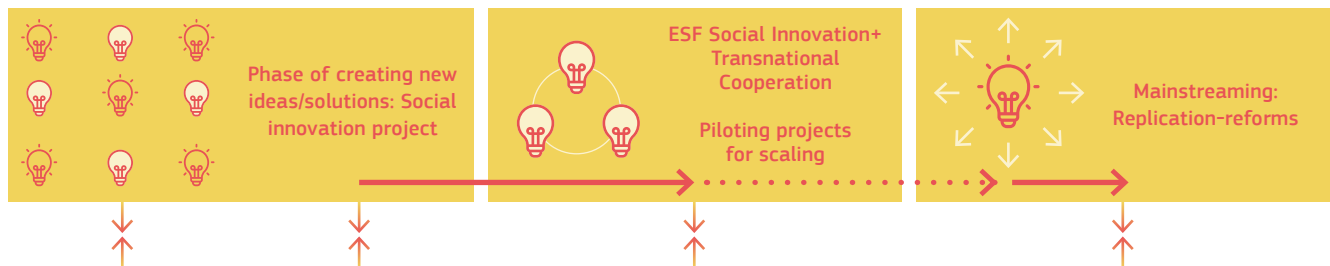
**The ESF+ is therefore creating a more favourable European ecosystem for the period 2021-2027 and it provides an increased support to both social innovation and social experimentation.** The new legal framework covers both the “ESF+ strand” (shared management with Member States and regions) and the “EaSI strand - Employment and Social Innovation” (direct management by the European Commission). This will allow for greater complementarities between the two funding instruments and new mechanisms will better support the use and upscaling of social experimentations. All phases of social innovation are therefore supported more consistently.

### 2021-2027 ESF+ SUPPORT FOR SOCIAL INNOVATION

#### FUNDING LEVEL



#### Innovation Phase



#### SUPPORT MECHANISMS



<sup>3</sup> Bureau of European Policy – BEPA (2014), Social innovation: a decade of changes, <https://espas.secure.europarl.europa.eu/orbis/document/social-innovation-decade-changes>

Social innovation and EaSI social experimentation projects will thus contribute to ESF+ general objectives of “high employment levels, fair social protection and a skilled and resilient workforce ready for the future world of work as well as inclusive and cohesive societies aiming to eradicating poverty and delivering on the principles set out in the European Pillar of Social Rights”, together with its 13 specific objectives<sup>4</sup>.

The EaSI strand of the ESF+ specifically supports SOCIAL POLICY EXPERIMENTATION through calls closely aligned with the EU policy priorities, which was also the case of the EaSI calls during the 2014-2020 period (Annex 1). The programme promotes an approach that is geared to policymaking and governance. Testing policy innovations at small scales before implementing them widely at national or regional levels should help policymakers to take informed decisions before reforming or adopting new policies, regulations and programmes, and to avoid misuse of public funding.

## 1. SOCIAL INNOVATION AND SOCIAL EXPERIMENTATION MAIN CHARACTERISTICS AND DIFFERENCES

Social innovation is sometimes perceived as a blurry concept by both project promoters and policymakers.

**However, building on the relevant academic work, the ESF+ regulation defines social innovation and social experimentation as follows:**

**Social innovation** means an activity, that is social both as to its ends and its means and in particular an activity which relates to the development and implementation of new ideas concerning products, services, practices and models, that simultaneously meets social needs and creates new social relationships or collaborations between public, civil society or private organisations, thereby benefitting society and boosting its capacity to act.

**Social experimentation** means a policy intervention that aims to provide an innovative response to social needs, implemented on a small scale and in conditions that enable its impact to be measured, prior to being implemented in other contexts including geographical and sectoral ones, or implemented on a larger scale, if the results prove to be positive<sup>5</sup>. (Article 2, definitions).

Turning definitions into practice can be challenging for both **social innovation** project promoters and the public authorities designing and implementing support mechanisms, including financial ones. For this reason, it is useful to focus on a number of key characteristics, which can guide the project design.

Some are common to both social innovation and social experimentation, like social aspiration, the existence of unmet social needs and the innovativeness of the response both in its content and in the way it is conceived and delivered. However, evaluation and upscaling are strict(er) requirements for social experimentation due to its “*testing dimension*”, despite being agreed steps for social innovation in general.

<sup>4</sup> REGULATION (EU) 2021/1057 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 24 June 2021 establishing the European Social Fund Plus (ESF+), article 3.1 and article 4.1.

<sup>5</sup> REGULATION (EU) 2021/1057 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 24 June 2021 establishing the European Social Fund Plus (ESF+).

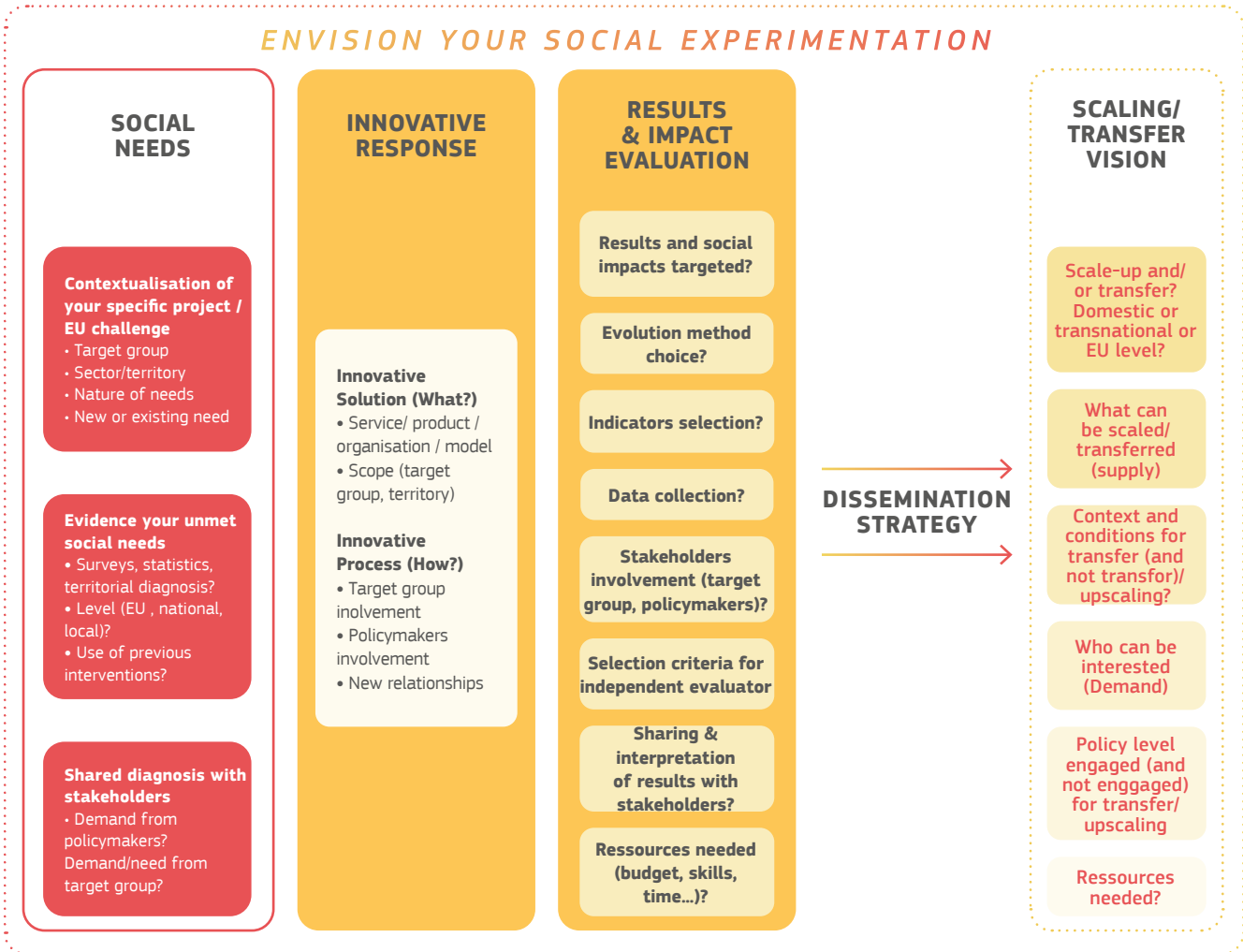
**COMMON CHARACTERISTICS OF SOCIAL INNOVATION AND SOCIAL EXPERIMENTATION:**

- 1) **A clear intended primary goal: to create positive social change** (social value) which is distinct from other forms of innovation with different primary aims (productivity, economic growth, profit) even if incidentally also delivering positive social outcomes.
- 2) **Identified social needs** not or badly satisfied by existing solutions from both public and private sectors.
- 3) **Innovative responses to those unsatisfied social needs; innovative in both:**
  - **the solution** produced whatever forms it takes (products, services, practices, models).
  - **the way this solution is produced**, because social innovation is **collective and collaborative**, based on the involvement of a wide range of stakeholders and creating new partnerships and new forms of collaboration between various stakeholders involved.

**SPECIFIC CHARACTERISTICS OF SOCIAL EXPERIMENTATION:**

- 4) **Small-scale implementation** of the pilot given the uncertainty of its effects (risks), not tackling the entire social needs at the pilot stage but a significant proportion.
- 5) **Conditions for rigorous measurement/assessment of social impact/outcomes**, in order to prove the effectiveness and efficiency of the solution tested.
- 6) **Early plans for a wider scale implementation** (transfer or upscaling) anticipating positive evaluation results.

These characteristics underpin the **“Envision your social experimentation”** canvas below, co-created with 2014-2020 EaSI projects to give an **overview of the different components that should be covered by a social experimentation project proposal**: (1) social needs; (2) innovative response; (3) results and impact evaluation; (4) scaling and transfer vision. However, social innovation and social experimentation are **iterative rather than linear processes**, meaning that it might be necessary to go back to the social needs definition during the implementation phase for instance, in case reality imposes to adjust them.





Section 1

# Unsatisfied or Insufficiently Satisfied Social Needs



## PRACTICAL GUIDANCE TO DEVELOP A SOCIAL EXPERIMENTATION PROPOSAL

The following four sections, based on the canvas structure, explain what those characteristics mean in practice. Each section provides:

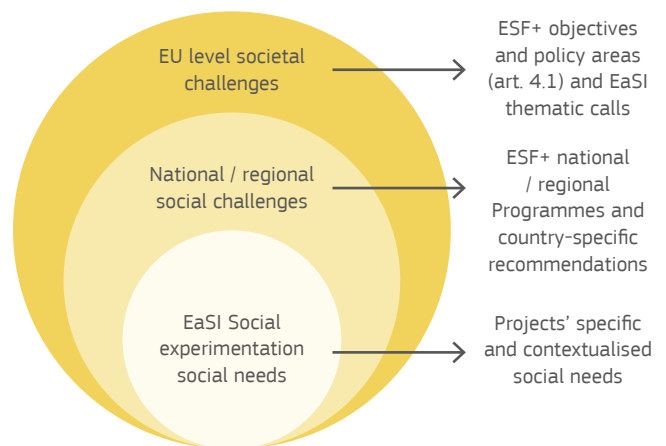
- A **short description** of the social experimentation component, its rationale and implications
- **References to relevant EaSI projects examples** (2014-2020) with hyperlinks to full project descriptions
- A **focus on some projects** to show the reality and diversity of practical cases and improve concrete understanding
- **Do's and Don'ts TIPS** from EaSI project teams sharing their hands-on and pragmatic experiences
- A list of **additional resources and tools**

## Section 1: : Unsatisfied or Insufficiently Satisfied Social Needs

Social needs are the roots of any social innovation and experimentation, and they are context-specific. In the case of EaSI projects, although social experimentation can apply to any field, sector or policy, the social needs to be addressed are **framed by the EU societal challenges** that they will contribute to tackle and which are here defined by the ESF+ objectives: employment and labour mobility, education, social inclusion and poverty eradication. EaSI projects social needs must be defined within this scope.

**This scope is then further specified in each EaSI call, targeting** an urgent challenge requiring new solutions, described at European level. The calls define target groups and specific approaches to be tested broadly enough to encompass the variety of realities at national, regional and local levels. These EU level social needs translate into different realities across participating countries<sup>6</sup>. At project level, social needs vary a lot depending on the local context (legal, political, cultural, etc.) they emerge from, despite all contributing to addressing the EU societal challenge of the call. The social needs of the **projects must be contextualised, and precisely described at**

**project level** to clearly delineate the scope of the social experimentation and establish a clear link between the small-scale experimentation and the global issue faced by the European Union. The table below shows a sample of the diversity of EaSI projects supported under the same call:



*Social needs contextualisation, author's own elaboration*

6 EaSI participating countries: **EU Member States, Albania, North Macedonia, Iceland, Montenegro, Serbia, Turkey.**



**Contextualisation process of social needs, from EU EaSI calls to projects' level:**

<b>VP/2014/008 Integrated delivery of social services</b>	<b>VP/2016/015 Fast-track integration into the labour market for third-country nationals, targeting exclusively asylum seekers, refugees and their family members</b>
<b>Innovative Patient-Centred Approach for Social Care Provision to Complex Conditions (INNOV-CARE):</b> inadequate social systems to address the social needs of those suffering from rare diseases (ES, RO, FR, SI, SE, AT).	<b>Fast-Track Action Boost (FAB):</b> needs of the refugees and asylum seekers for a better and faster integration in the labour market and needs of cities to improve and better deliver job inclusion services for refugees (IT, DE, SE, ES, RS, AT).
<b>Family STAR:</b> need for softer, preventive welfare interventions to address young dropouts (IT).	<b>Regional Integration Accelerators (RIAC):</b> gap period between the arrival of an asylum seeker and the recognition of international protection, slowing his access to labour market guidance (DE, IT, DK, TR,).
<b>Vouchers for the provision of childminders:</b> lack of flexible childcare services for employees with non-standard working schedules (LV).	<b>Fostering Opportunities of Refugee WORKers (FORWORK):</b> lack of labour market integration opportunities for asylum seekers in reception centres (IT).

**The 2014 call supporting reforms in social services** was quite open in terms of final beneficiaries, resulting in a wide range of target groups in the awarded projects and quite prescriptive concerning approaches to be tested, well followed by all projects (one stop-shop, personalised approaches to social services and innovative strengthened partnerships between public, private and civil society sectors).

On the contrary, **the 2016 "migration" call** precisely defined the target group at EU level, giving more flexibility for the approaches to be tested. But behind this specific common target group, projects were different, answering to social needs that vary depending on the country (reception or transit); on the migrant population number; profile; skills and needs; existing laws, policies and support programmes at national, regional and local levels; political context and culture and history of each place where pilots were tested.

## 1. IDENTIFY, ASSESS AND EVIDENCE YOUR SOCIAL NEEDS IN CONTEXT

The innovative response is an assumption to be tested, but **the existence of social needs must be demonstrated and assessed both quantitatively and qualitatively.**

At the start of your social experimentation, you should precisely describe and contextualise the social needs that your project seeks to address, demonstrate their reality and determine their precise nature and scope (number and profile of the population, organisations or territories in need) to ensure that the innovative solution you will develop is accurate.

### 1.1 A thorough desk research

Existing **reports, studies, surveys, statistics and territorial diagnosis** will help you to define the “state of play” and take stock of it. Using existing information, data and results avoids waste of resources.

**Focus on information that is relevant to your specific project objectives and context.**

**Choose and combine the different sources** (international, European, national, regional and/or local sources

of information or sectoral) such as (non-exhaustive list):

- Statistics (EUROSTAT, national and regional statistics)
- Scientific databases and academic and research production, including EU H2020 projects
- The European Semester–Country Specific Recommendations
- National and regional authorities reports and territorial diagnosis

The project below is a good example of an in-depth social needs analysis, using different sources of data, including some rarely used, from public administration.

**FORWORK (2016)** is a pilot project aiming labour market integration of asylum-seekers and refugees hosted in reception centres (CAS) in Italy, with the view to inform a future possible policy reform at national level; planned at the time of the EaSI call. The team used Eurostat, national and regional statistics to define the precise context and scope of migration in Italy and its specific needs not faced in other EU countries.

**European data** served to establish the specificity and complexity of the Italian situation compared to other EU countries. Opposite to countries like Germany, providing language courses, work-integration activities and counselling, asylum-seekers in Italy are only offered ad hoc integration initiatives organised in reception centres, far from answering their needs for integration. In addition, the migrant population profiles are different from other European countries, with lower skills, which impact on the training needs and solutions to be developed. Aiming at a national reform, the **FORWORK** team intensively used **national data and statistics** (from the Office of the Ministry of Interior and Italian National Statistics Institute (ISTAT) and from the Ministry of Labour – General Directorate for Immigration). It was verified that 85% of asylum seekers are hosted in centres offering extremely limited opportunities for labour market integration, fuelling internal tensions and increasing the risk of social exclusion for migrants. The project targeted 600 asylum seekers and refugees hosted in CAS centres. They also used **regional administrative data** from prefectures and from the regional PES information system, which had never been done before and proved of great value. Localisation maps and precise number of migrants in reception centres were assessed and it allowed to develop a pilot adapted to those specific social needs as well as to define a control group for the counterfactual impact evaluation, the largest ever done in Italy (1200 participants in total). Their pilot was implemented in the Piedmont region, chosen for the distinctive features of its integration system with a large number of reception centres of small-medium size. Access to these data was made possible thanks to the public-private partnership in which the public was represented by national and regional bodies coordinating the PES, the Directorate-General for Immigration of the Ministry of Labour and by the regional prefectures.

## 1.2 Perform your own social needs assessment

Social needs identification is often mainly based on desk research, due to the lack of resources to involve stakeholders. Do not hesitate to complement the existing information with your own surveys to get the most relevant and updated information for your project, as many EaSI projects have done.

**Consider adequate time and resources** to get the survey's results, which will delay the start of your pilot implementation.

**INSPIRE (2014)** developed a multidimensional and comprehensive assessment process of the situation of fragile people accessing the Social Care Services in Rome. To start with, the team organised group meetings with the representatives of the beneficiaries and the family associations, complemented by an analysis of the needs through the social record.

It is particularly useful for **social experimentation covering different countries**, with pilots in several countries and the ambition to transfer in other contexts or to develop a European model. The social needs assessment is broad and covers different national contexts, which is often challenging. In that case, few or no existing reports and statistics rarely provide comparable information and data in the different countries at a

level that fits your project's objectives, and you may need to complement desk research with your own surveys to get the precise information you need.

**InCARE (2019)** is implementing socially innovative long-term care service pilots in Spain, Austria and North Macedonia. The team used several sources, e.g. the European Social Policy Network (ESPN) country reports on challenges to long-term care (LTC), the International Long-term Care Network (ILPN) and other research, to identify the context-specific challenges in these three countries. The team also launched Theory-of-Change Workshops involving relevant stakeholders and developed a common methodology to carry out situational analyses in participating countries covering various aspects of long-term care in the respective national context. Furthermore, an online survey was launched to get further insights on expectations, experiences and attitudes towards care-giving and care-receiving.

**In some cases, little research has been done**, or not at the right level for a given project. Information is either missing or too general. The social experimentation project below undertook the first social needs assessment at EU level for its own purposes, which can be a benchmark for future projects working on a similar topic:

**INNOVCare (2014)** aims at bridging the gaps between health, social and local services to improve care of people suffering from rare diseases (RD) by developing a holistic, person-centred care pathway that links health services to social and support services and with the initial goal to create a European model and transfer it to other European countries. The partnership was thus transnational (Spain, Romania, France, Slovenia, Sweden, Austria).

They started by assessing the unmet needs of this specific population, implementing the **first ever comprehensive pan-EU survey with a sample of more than 3000 participants from across 23 EU Member States**. The results confirmed the project team's hypothesis that people with RDs and their carers often face not just disability but also social exclusion, unemployment and economic hurdles. According to the survey results, 70% of the respondents had to reduce or stop their professional activity and 69% suffered a reduction in income, which worsened their socio-economic standing. This "Juggling care and daily life" survey<sup>7</sup> was conducted via the EURORDIS survey initiative, RareBarometer Voices. On the basis of those clearly identified needs, they developed a pilot in Romania to test the innovative care pathway model. It enables the exchange of information and coordination between health, social and other support services (employment, school, transport, etc.) and between national, regional and local levels by integrating the national one-stop-shop service with regional case handlers. **INNOVCare** has created the RareResourceNet, a European network of resource centres for rare diseases, which can in turn be useful for future projects working in this field.

### 1.3 Use of social needs assessment

The assessment is useful to quantify and qualify the scale of the issue and to design an appropriate pilot. The small scale pilot should have similar or comparable conditions with the wider level at which the experiment will be implemented if the pilot is successful (same population, same socio-economic conditions, and/or same type of territory etc.).

**Community-based social service centres (CSSC) (2019)** developed a pilot model of a platform integrating social and health services of various providers, connecting several local municipalities in Slovakia, where the provision of LTC is very fragmented and competences divided between Ministries. The team used a territorial analysis to select participating pilot municipalities, with aggregated indicators taking into account the economic and demographic situation, and the level of need for assistance in the social domain.

<sup>7</sup> [http://download2.eurordis.org.s3.amazonaws.com/rbv/2017\\_05\\_09\\_Social%20survey%20leaflet%20final.pdf](http://download2.eurordis.org.s3.amazonaws.com/rbv/2017_05_09_Social%20survey%20leaflet%20final.pdf)

The assessment gives you precise indications to better design your innovative solution, and to avoid some adjustments during implementation due to not sufficiently well identified needs (see section 2).

## 2. SHARE YOUR ASSESSMENT WITH STAKEHOLDERS

Social experimentation is a collaborative process, and the social needs diagnosis should be shared by a wide range of stakeholders. The more the assessment is shared, the more legitimate it becomes; a solid foundation to prove there is a real demand for your innovative solution. Finding and involving the right partners, stakeholders and end users starts here (follow-up in section 2).

### 2.1 With the target group

The target group should always be involved in a social experimentation project, from design to evaluation and undoubtedly in the **assessment of the reality of THEIR social needs**, including the different “incentives, opportunities or constraints” with which the target group is confronted “to ensure that the targeted population will indeed be willing and able to participate”.<sup>8</sup>

However, their participation can be challenging in view of their situation (high fragility, linguistic barriers) or any other reason making a direct access to them difficult and resource intensive (numerous populations, geographical distance). The COVID-19 pandemic forced several projects to change their plans as direct participation became impossible, at least, in person. **They can participate directly, or indirectly.**

- **Direct involvement**

Some projects managed to **directly** involve the target group in the social needs diagnosis, most of them based on a user-centred approach, sometimes engaging other categories of stakeholders.

**I-CCC (2019)** conducted a community needs assessment using a user-centred approach with citizens and regional stakeholders' participation through interviews and focus groups in the six pilot regions.

**InCARE (2019)** implemented “Theory of Change Workshops” with the target group and other stakeholders, even online due to COVID-19 restrictions.

In **RIAC (2016)**, all partners hired personnel who were former refugees.

- **Indirect involvement**

The target group can also be **indirectly** associated with the needs assessment, through intermediaries living or working with them, like families, small organisations and service providers, representing the target group. Professionals and practitioners are often involved too, adding their valuable professional knowledge to the information collected through research.

The project below illustrates well how to use representatives of the target group to better assess unmet social needs and to support the design of the pilot.

**ETS (2018)** is developing the pilot stage of a European web-based pension tracking services to help mobile workers follow their pension rights gained in different Member States and pension schemes in the course of their career. The project targets all EU mobile workers, with a pilot covering five countries (Germany, Austria, Belgium, Sweden and the Netherlands).

The assessment process started with Eurostat statistics and the annual EU Intra-Mobility Report of the European Commission in order to better define and describe the target group of mobile workers. On that basis, three main sectors most impacted by workers mobility were identified: research, construction and health. The team could thus focus on this narrower field to pursue the needs assessment. The pilot stage started with the five partner countries. Interviews were then conducted with experts and professionals representing mobile workers from these three sectors, like nurses and doctors associations in Germany, Sweden and the Netherlands. This was done in cooperation with national pension systems providing the names of the experts. The information gathered through these interviews helps to better design the services offered by the pilot website, by means of a user-centred approach to conceive the three “user cases” of the website (young or starting career, family or pension and generation 50plus). Talking to representatives of user groups, trade unions or employers in sectors with high professional mobility supported a quicker mapping and understanding of the target group needs.

## 2.2 With the policymakers

When policymakers are involved in the definition of the social needs and recognise them, the chances to mainstream your social experimentation and create an impact at policy level are higher.

**2014** [RESISOR](#)  
**2016** [FORWORK](#)  
**2018** [DEMPTOP](#), [BELMOD](#), [MOSPI](#)

If your project results from a policy demand, in view of a reform or the adoption of a new regulation or programme (see section 4), the social needs are already acknowledged, and policymakers are directly interested in the solution developed

Most of the times, they lead the social experimentation.

If not, you should try to involve them in the design of the project, including the social needs assessment.

If policymakers do not recognise the reality and value of social needs you wish to meet, their support at the upscaling stage will be lacking. Share the results of your needs assessment with all policymakers concerned by your social experimentation future results and with the power to support its scaling, whether they are partners or not. Raise their awareness of the issue at the start, to give them enough time to plan and prepare a future upscaling of your pilot if the topic was not yet on their agenda.

Pay attention to the country or region’s political agenda to identify who is interested in your experimentation and use the momentum, when the topic is of high interest before reforms.

In the **I-CCC project (2019)** policymakers were eager to participate because long-term care is high on their agenda, Austria, Serbia and Montenegro all undergoing a process of national care policy reforms.

**RuralCare (2019)** conducted interviews with the mayors of the municipalities of the pilot territories to find out their interests and needs and they participated in the entire process.



## TIPS FROM PEERS!

*“The involvement of social partners, employers in particular, is key to define the needs of the target group and type of knowledge needed (refugees) when dealing with labour market integration.”*

**ALMIT project team**

*“On top of group characterisation and categorisation, it is important to analyse the individual characteristics of each person, delivering an individualised diagnosis which prevents assumptions based on group categorisations. In other words, pathways need to be adapted to the individual person.”*

**ERSISI project team**

*“Small organisations are best placed to refine approaches, their participation must be facilitated, not automatically as a partner.”*

**FAB project team**

*“Local innovators should shift focus away from best practice initiatives and towards defining the best fit for purpose initiatives.”*

**InCARE project team**

*“Having a partner specifically devoted to research, regularly taking part in the coordination group, is very valuable.”*

**FORWORK project**

### RESOURCES BOX

<a href="#">European Observatory on Health systems and policies</a>	Country monitoring, analysis, performance assessment, knowledge brokering
<a href="#">European Foundation for the Improvement of Living and Working Conditions</a>	Eurofound has three thematic observatories to gather and publish data and information on a continuous basis <ul style="list-style-type: none"> <li>- European Observatory of Working Life – EurWORK</li> <li>- European Monitoring Centre on Change – EMCC (employment and labour market)</li> <li>- European Observatory on Quality of Life – EurLIFE</li> </ul>
<a href="#">Cedefop</a>	CEDEFOP thematic reports, country specific reports, online tools, database, scoreboards and a lot more in the field of vocational education and training (VET) as well as skills and qualifications policies
<a href="#">Social Services Network in Europe - ESN</a>	Annual review, policy papers, thematic reports covering 16 themes and practices
<a href="#">Empathy mapping with target group</a>	Short guide on how to organise Empathy Mapping workshop activity, helping teams to better understand their users with simple visual capturing knowledge about users' behaviours and attitudes
<a href="#">Theory of Change (ToC) workshops guidance</a>	Outline to conduct ToC workshops, used by <b><u>InCARE</u></b>
<a href="#">DIY toolkit on how to invent, adopt or adapt ideas that can deliver better results</a>	Collection of 30 practical social innovation tools easy-to-use. Here in particular: “collect input from others” and “know the people I’m working with” <a href="#">Causes diagram</a>
<a href="#">Using Research Evidence</a>	Practice guide (NESTA) created to help you use research evidence to improve your work
<a href="#">Get to know your audiences (Personas)</a>	Developing a realistic idea of the ‘personas’ in your target audience focused on real people instead of an abstract, general audience



## Section 2: The Social Experimentation Innovative Response

The innovative dimension is **reflected in both the new solutions developed**, whatever form they take, and **simultaneously in the way these solutions are produced**. Its innovative dimension is relative and very context-specific. Innovation is not an objective per se. Social Innovation addresses the social challenge in a **new way**, which is **expected to achieve better positive social impact than existing ones**.

### 1. TYPES AND CHARACTERISTICS OF INNOVATIVE SOLUTIONS

Most of the time, social experimentation combines innovative types of solutions such as a new service delivered in a new way that results into a modified structure of the organisation.

<b>New product</b>	Innovative products are often not the main objective nor the main innovative dimension of the project. Some examples cover software ( <a href="#">PACT</a> ), information systems, online platform (ETS), training curricula and material ( <a href="#">FIER</a> ).
<b>New service</b>	Innovative services are the type of new solutions most developed by EaSI projects: integrating existing services (social, health, employment, care, etc.), creating new practices and services (outreaching case management, mentoring, tutoring, etc.) and/or creating new working positions (case handlers, financial capability officer).
<b>New process</b>	New ways of providing services (by integrating services delivered in a new comprehensive package, new practices, etc.).
<b>New model</b>	New models are concepts, methods, approaches codified and modelled in a simplified way in order to be reproducible by others and generalised: ( <a href="#">INSPIRE</a> , <a href="#">FIER</a> , <a href="#">RIAC</a> , <a href="#">FAB</a> ).
<b>Organisational innovation</b>	Changes in the functioning, structure and processes within the organisation that works with the target groups, also developed by the majority of EaSI projects (one-stop-shop).



The **intensity** of innovation is also variable, from **incremental** (improving existing solutions, prevalent in social experimentation) to **radical** (developing totally new solutions, requiring complex experimentation).

The innovative dimension of the solution is **relative and context-specific**. Social experimentation often “originates locally and is perceived to be a ‘highly contextual phenomenon’”<sup>9</sup> depending on the national/regional context (policy, legal, financial, administrative and cultural conditions).

- **New to a country** ([FORWORK](#)) or **region** ([Bridging Young Roma and Business](#), [RIAC](#), [InCare](#)) or **city** ([INSPIRE](#), [ESTI](#)) even if it is well established in other territories;
- **A novelty for specific target groups**, even if already commonly used with others ([Family Star](#), [MOSPI](#), [InCare](#));
- **Innovative for a sector or social area** (ETS, [HomeLab](#), [UNIC](#)).

9 Moulart, F. (2007), *Social innovation, governance and community building* [https://cordis.europa.eu/docs/projects/files/HPSE/HPSE-CT-2001-00070/100123951-6\\_en.pdf](https://cordis.europa.eu/docs/projects/files/HPSE/HPSE-CT-2001-00070/100123951-6_en.pdf)



**Examples of innovative solutions, showing variety and relativity.**

CALLS	INNOVATIVE SOLUTIONS EXAMPLES (2 PER CALL)	
<p>Integrated delivery of social services (2014)</p>	<p><b>PACT</b>                      New organisation (one-stop-shop)                      Case managers function                      New IT tools (tracking software and diagnostic tools)                      Collaboration among all levels in the organisation (formal agreement between health and social sectors actors - taxonomy included)</p>	<p><b>INSPIRE</b>                      New one-stop-shop for fragile people                      New Information system (SICS) based on a Social Network Architecture (SNA)                      New services with a collective dimension (socio-occupational laboratories, solidarity condominiums)                      Innovative system actions to capitalise on the unutilised urban facilities</p>
<p>Integrated social services for the integration in the labour market (2015)</p>	<p><b>ERSISI</b>                      Multidisciplinary pairs of case handlers (job activation and social work)                      New digital application for co-assessment of social exclusion, individual potential and employability                      New form of cooperation: "Local Employment Groups" (public and private stakeholders)</p>	<p><b>HOMELAB</b>                      Innovative Social Rental Enterprise (SRE) model (integrated housing, employment and social services)                      New forms of cooperation between institutions and organisations (local banks, municipalities, private landlords, real estate agencies, etc.)</p>
<p>Fast-track integration into the labour market for asylum seekers, refugees and their family members (2016)</p>	<p><b>FIER</b>                      Very fast dual training schemes (3-6 months) combining language and professional skills in the workplace                      New regional triangular cooperation (job services, educational institutions and companies) in 3 sectors</p>	<p><b>ALMIT</b>                      Combination of 3 courses: language, intercultural and ICT training                      Mapping and profiling of skills to labour market needs and adapting them to migrants qualifications                      Social partners involvement</p>
<p>Innovative work-life balance strategies (2018/005)</p>	<p><b>R.A.F.F.A.E.L</b>                      7 new local services                      New territorial cooperation model                      Innovative forms of funding (crowdfunding)</p>	<p><b>MIC</b>                      Training for a new target group (men)                      Merged existing methods adjusted to specific regional needs                      New cooperation between education institutions, trade unions, municipalities</p>
<p>Access to social protection and national reform support (2018/003)</p>	<p><b>BELMOD</b>                      Income support simplification and harmonisation                      Development of a simulation model</p>	<p><b>ETS</b>                      New service: European pension tracking system for mobile workers (proof of concept)                      Pilot website based on user-centred approach</p>
<p>Social innovation and national reforms, long-term care (2019)</p>	<p><b>To give what is really needed</b>                      Model of professional home care for people with chronic disease in rural areas                      Network composed of local medical services, welfare services and volunteers                      New role of "care coordinator"</p>	<p><b>Rural Care</b>                      Person-centred long-term care services including screening of the home needs                      "life project": agreement between the person and the social workers based on user desires</p>

## 2. PARTNERSHIPS AND PARTICIPATORY APPROACHES

Social experimentation and social innovation are *inherently collaborative*<sup>10</sup> and involve the **participation of a wide range of stakeholders**, as stated in the EU definition of social innovation. They “create new social relationships or collaborations **between public, civil society or private organisations**, thereby benefitting society and boosting its capacity to act”. This cross-sector and multilevel collaborative approach transcends traditional silos and is in itself a driver for innovation. This is the rationale behind the necessity for a **partnership approach** in social experimentation and social innovation.

EaSI calls always require developing “**sustainable multi-level partnership models**” and all projects with rare exceptions, are implemented by very wide and diverse partnerships fitting their experimentation.

There are different “circles” of stakeholders in a project. Their nature and roles are specific to each project:

- The partners of the consortium, fully involved, implementing the experimentation awarded the grant
- The associate organisations committed but at no cost
- All the other stakeholders involved, including those practically implementing the pilot (social services, practitioners, mentors, trainers, administration staff, etc.)
- The target group benefitting from the results of the social experimentation

The **nature and form of involvement** vary from simple consultation to full co-creation process and participation to the governance of the project.

**Transnational cooperation** is a powerful form of collaboration with regards to social experimentation and a strong component of the EaSI programme. The difference between ecosystems of different countries is challenging for cooperation but it clearly broadens the scope of innovation and brings in a diversity of social innovations developed in different framework conditions. It helps partners to “think out of the box” and enrich the knowledge exchanges and possibilities of mutual learning. This type of collaboration is also the most efficient vehicle for the transfer of good practices and working models between European countries and regions.

### 1. APPRAISE THE INNOVATIVE DIMENSION OF YOUR SOLUTION

You cannot claim that your solution is innovative without referring to some benchmarks. Your solution’s innovative dimension should be **assessed in comparison with existing solutions** and the extent of improvements and changes realised.

Social experimentation rarely starts from scratch, as shown by the majority of EaSI projects from 2014-2020 calls. Taking stock of current policies, practices and models contributes to building and expanding a shared knowledge and to improving and accelerating social experimentations. Comparing with other contexts, including in other countries, will allow you to measure the relativity of your innovative solution and demonstrate its novelty in your specific context. Existing solutions in a country, region, sector or even for a target group can be new for you. It will also be useful for the evaluation, notably for cost efficiency (section 3).

#### 1.1 Literature review and practices mapping

Starting with a good mapping and literature review of the existing practices helps better define your own pilot, as confirmed by several projects.

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10 *Building local ecosystems for innovation*, OECD 2021, p.12.

**INSPIRE** (2014) mapped existing innovative practices which could apply to Rome's case and this allowed them to develop a tailored implementation approach towards a greater variety of citizens' needs.

**UNIC** (2019) mapped existing PB systems in Belgium, Finland, Austria, Spain, Czech Republic, Italy, Ireland, Scotland and in Israel, New Zealand and Australia but confirmed the lack of transnational exchange between them, which is the rationale of their project.

**Men In Care** (2018) performed an assessment of gender inequalities in current work-life balance practices through national benchmarking reports.

**RuralCare** (2019) solution is based on a comparative study and a benchmarking report.

## 1.2 Use existing solutions or some of their elements

Your innovative solution can **further innovate on the basis of previous projects**. Your innovation will be more incremental, often expanding the previous partnership.

**HELP** (2015) integrated employment support to the existing housing support and involved more institutions and stakeholders to a previous employment support programme for people in temporary accommodation. **MASP** (2018), fostering a more equal distribution of care responsibilities between working men and women, based its pilot on two previous Italian experiences, merging and adapting them to the specific context.

Mapping other positive initiatives is a very good **opportunity to use, adapt and integrate available methods, tools, models and results** produced by research or previous projects, implemented domestically or abroad. You can learn from previous solutions and also from failures and even find stakeholders or additional partners who can usefully contribute to your project. As said, **introducing existing good practices in a new context** where they meet unsatisfied social needs is an innovation and was the rationale behind many EaSI projects.

**Family Star** (2014) introduced Focus Group Conferences (FGC) as a preventive method applied in schools in Italy based on positive experiences in New Zealand and a smaller Italian pilot (2013-2014).

**TSUNAMI** (2015) implemented the IPS model being aware of its successful application in the United States and other European countries.

**FAB (2016)** used and further innovate an existing methodology to transfer and adapt local good practices.

## 1.3 Continuously test and adjust

**Experimentation is an iterative process** made of trials and adjustments, an integral part of any experimentation. It takes time and this must be anticipated.

The standardisation of the **RIAC** model was done in 4 cycles of optimisation: pilot, adjustment of concept, proof of adjusted concept and final concept. The project model has been increasingly refined and adapted to local situations in different countries in an often very dynamic scenario with strong political and financial pressures in several countries and the COVID-19 pandemic at the end of the implementation.

During the implementation, while testing, you will often need to adjust to an evolving reality, unforeseen or

unexpected changes. New needs may emerge or may have not been well identified during the assessment such as the target group volume, level of skills; social situation; legal framework limits; administrative barriers; difficulties to engage with stakeholders or the target group. More than in any mainstream project, these risks should be anticipated and taken into account to better manage them.

## 2. DEVELOP NEW FORMS OF MULTI-STAKEHOLDERS COOPERATION

### 2.1 Create living, useful and creative partnerships

The importance of strong and relevant partnerships was stressed by all EaSI projects. And **there is no “standard good partnership”**. The **collaboration** between the different stakeholders takes place **throughout the whole process** and it can fluctuate depending on the phase of development.

- **Undertake a stakeholders’ mapping in relation to your objectives and activities.** Do not limit yourself to the formal partnership (consortium), map all actors involved even informally or practically in the pilot implementation.
- **Identify the expertise and skills needed for your experimentation** and allocate specific roles to each partner as well as the other stakeholders needed to implement, evaluate and scale your innovative solution. Fill the gaps if you find an expertise or function is lacking; and find the missing partner.

**INNOVCare** (2019) needed case managers for its pilot as well as to ensure the upscaling in the national healthcare system and the sustainability of the project in the long-term. The team identified that this could be achieved by training the community nurses as case managers for rare diseases.

- **Organise space, time and processes** to allow for in-depth exchanges, mutual learning and co-production of the solution, as well as mechanisms to manage potential conflict of interests. Try to empower all stakeholders. Partnerships are living entities, not a formal empty shell. Official meetings and an online shared repository are not sufficient to create long-lasting collaborations. Job shadowing, joint study visits, peer mentoring are possible options to explore. Many forms of involvement of the various stakeholders can be used, from participatory approach to decision-making.
- Try an **innovative governance model** involving partners from different sectors (public, private, civil society).

**TSUNAMI** (2015) has sought to test an active labour market policy targeted at unemployed individuals with mental illnesses in the Piedmont region. The pilot’s methodology was based on the Individual Placement Support (IPS), which aimed to bring more people with severe mental illnesses into employment by providing to them a complex series of services (eleven months) mainly based on job coaching and the activation of internships.

The pilot, led by the Piedmont Region, proposed an innovative horizontal cooperation between public, private and social economy sectors’ (CSOs, social enterprises, NGOs) stakeholders. Close and practical cooperation was facilitated by peer-to-peer training between third sector and public services (PES) to reinforce a community of practice. Job coaches from social enterprises directly cooperated with the PES operators in charge of the labour market integration of people with disabilities in PES offices and the three types of stakeholders participated in Focus groups. This resulted in improved capacity building and transfer of competencies between stakeholders. It also enriched the project opportunities and perspectives.

Some of these new collaborations are sustained after the experimentation, such is the case of the European Network of Resource Centres for Rare Diseases – *RareResourceNet* or new cooperation models between regional partners, like in Baden Württemberg. Some achieved formalised cooperation between stakeholders, like RuralCare, with a formal agreement between health and social sectors’ actors, and **PACT** with a multilevel formal agreement between different levels of public administrations (regional and local) and the Third Sector,

including on taxonomy of social inclusion/exclusion.

## 2.2 Partnerships main actors

- The **target group** participation is a key feature and should not just passively “receive” the solution but contribute to the design of the pilot and decisions should be centred on their needs. They are the best placed to provide useful feedback about the innovative solution they benefit from and that can be adjusted before evaluation results if needed. As for the social needs assessment (section 1) opt for their indirect participation when involving them directly is challenging (volume, outreach and communication obstacles, lack of trust often underestimated) and rely on the professionals providing individual support to the target group (mentors, personal case handlers, job coaches, etc.).

Integrate a **user-centred approach and empowerment activities** to benefit from their active participation in the pilot design and implementation, like EaSI projects below.

**RuralCare** (2019) develops users' individual life plans (“life project”) with personal interviews leading to an agreement between the user and the social workers, in which users choose the professional and the type of support they need the most, based on life expectations and wishes.

In **FIER** (2016) self-empowerment of participants became central and applied across all pilots. Refugees were empowered to steer their own learning process with the help of personal portfolios, working on learning content according to their workplace needs.

In **RIAC** (2016) a user-centred approach allowed refugees to assess whether the job offered was suitable for them. This freedom to choose the job opportunity rather than imposing it, is more successful.

**ERSISI** (2015) innovative solution relies on the intensive “activation mechanisms”: service users get involved and activated by proposing continuous quick actions adapted to their personal needs and within a limited duration of five months. Insertion pathways will only work if service users participate in the definition, their needs are listened to and the pathways respond to their actual needs and expectations.

- **Policymakers** are instrumental because of their capacity to sustain, mainstream and embed the solution tested positively. To ensure a possible upscaling at national level of pilots tested at local level, you must involve national authorities. **MISSION** (2015) local pilot was upscaled at national level thanks to the multilevel governance model established: a stakeholder group with local policymakers, a steering committee with local, regional and national policymakers and an EU advisory board with international experts.

As already seen, in all projects deriving from a policy demand, policymakers' support is strong.

But if your project emerges from other stakeholders' ideas (research, NGOs, civil society) policymakers' awareness and willingness to participate must be sought. Give them concrete insights, active roles, show them how your solution is of interest for their political agenda and valorise their commitment. **Community-based social service centres (2019)** selected its pilots' locations on the basis of the mayors' willingness to participate, which proved efficient.

To avoid instability of your project linked to political changes affecting policymakers, do not automatically allocate the coordination role to them. Use the possibility introduced in the latest EaSI calls to give this leading role to community service organisations (CSOs).

- **Employers** will be needed if you are developing a **solution in relation to employment and labour market integration**; it makes a positive difference. But they often lack time and are hard to engage with.

Their involvement offers real work perspectives for participants; it is more motivating. Training in the workplace provides useful skills and qualifications to participants as well as matching the local labour

market needs and shortages. It proved efficient in all 2016 projects. But you also have better chances to have them embarked if you support them during the pilot.

**Bridging Young Roma and Business (2015)** tested a model of integrated service delivery for access of young Roma to the private sector labour market. They used HR professionals to ease the connection with companies. These professionals helped tailor training and recruitment activities to the needs of the labour market, bringing in HR tools and methods (HR dinners, mini-internships, CV workshops, job interview preparation). Participating employers received assistance in adapting recruitment procedures and internal mentoring.

- The **research partners** are also very important, as recalled by many projects, in particular for social needs assessment, mapping and benchmarking of existing solutions. In the case of projects mainly led by professional practitioners or policymakers, this complementary expertise will be essential.
- In some cases, the **independent evaluators** are partners, involved from the beginning (**TSUNAMI**, **FORWORK**) providing their technical knowledge to co-design monitoring and evaluation systems with the other partners.



## TIPS FROM PEERS!

*“Ensure a real and effective ownership of the actions among all the stakeholders involved. This will reinforce the potential of replicability and scalability of the social innovation proposed.”*

**TSUNAMI project Team**

*“Insertion pathways will only work if service users get involved and assume the process. This will be possible only if service users participate in the definition, their needs are listened to and the pathways respond to their actual needs and expectations. It is better to opt for encouraging participation rather than basing the intervention on compulsory measures.”*

**ERSISI project Team**

*“To minimise the risk associated to political changes, policymakers can be involved as partners, but the leading role (coordination) can be attributed to CSOs to minimise the risk of instability.”*

**The I-CCC project**

*“It is important to have in the Consortium representatives from key institutional actors as they can help adjust the implementation strategies eventually affected by legislative changes.”*

**FORWORK project Team**

RESOURCES BOX	
<a href="#">List of databases of EU-funded research and innovation projects</a>	Nine databases, to which a database on social innovation projects will be added soon
<a href="#">Participatory Approach in Implementation</a>	<p><b>This Guide is concerned with relationships and roles of the different stakeholders during the implementation of policies and action plans</b></p> <p><a href="#">Stakeholders Ecosystem Map</a>  <a href="#">Stakeholders Analysis Table</a>  <a href="#">Stakeholders Importance/Influence Matrix</a></p>
<a href="#">MIRO co-creation tool</a>	MIRO used during guide co-creation workshops to perform a stakeholders mapping
<a href="#">Innovation Place</a>	Find partners for research and innovation projects. Search grants in European and National funding programs
<a href="#">EUresearch</a>	Swiss guide to European research and Innovation – Partner Search Platforms
<a href="#">European Long-Term Ecosystem Research Network (LTER)</a>	LTER helps development management options in response to global change challenges while contributing to Europe’s knowledge base. Search for both sites and people
<a href="#">WOTIFY open tools for creative teams</a>	Tools and canvas to help you co-design viable applications for education, cultural heritage and design with a social impact (Platoniq), in particular <a href="#">People and stakeholders map</a> <a href="#">Imagine your idea as an ecosystem or platform</a>
<a href="#">DYI toolkit on how to invent, adopt or adapt ideas that can deliver better results</a>	Collection of 30 practical social innovation tools easy-to-use, in particular the Learning loop tool and the People and connections map
<a href="#">Cedefop The business case for diversity : good practices in the workplace</a>	<b>New report on European businesses and diversity policies</b>
<a href="#">Design kit user centered methods</a>	Human-centered design approach and methods (step by step guidance)



Section 3

# Assessment *of* Outcomes *and* Social Impact





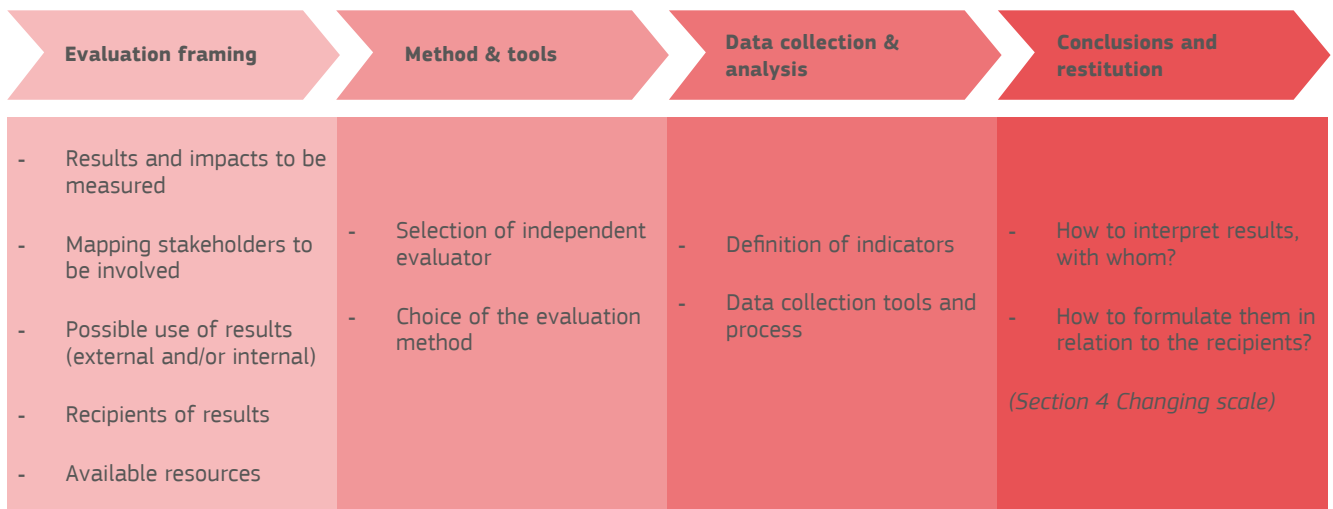
## Section 3: Assessment of Outcomes and Social Impact

Evaluating social experimentation is an absolute requirement because of its **“testing dimension”**. This implies setting up robust monitoring and evaluation systems from the beginning, in order to demonstrate that the results and impacts are successful, providing better solutions than existing ones. Evaluating social experimentation requires comparing the results obtained with the targets set at the onset but also, especially for cost efficiency, with other existing solutions to prove your results are markedly superior.

This evidence-based reliability will increase the potential for the expansion of your solution at a larger scale. It will facilitate access to funding and further support and was seen as a good practice by 2014-2020 projects themselves, encouraged to monitor their internal effectiveness and efficiency.

**Results and impacts should be assessed quantitatively and qualitatively at three levels:** (i) target group – improved situation and empowerment; (ii) organisations – increased innovative capacities; (iii) policy level – social experimentation elements embedding into mainstream policies, expanding the social benefits more widely.

**The evaluation will be specific to your project,** depending on the topic of the call, your experimentation context, the social needs to be addressed and the solution chosen, which means there is no one-fit-all method or standard list of indicators. However, the main general steps are:



*Social experimentation evaluation main steps, author's own elaboration, inspired by SOCIAL IMPACT EVALUATION AND INDICATORS, Interreg Alpine Space and Avise "comment évaluer son impact social, principes méthodologiques" Sept 2021.*

### 1. DEFINE AND SELECT WHAT YOU WANT TO BE MEASURED

Carefully frame your evaluation, be focused and identify and select results and impacts to be measured **in relation to the main objectives** of your experimentation. What are the main intended effects of your experimentation? Remain proportionate and select the most relevant ones only, and those for which you can gather robust data.

Your **target group** should be precisely defined; the selection criteria should be realistic in relation to its size and possible access/availability to avoid over-ambitious targets.

Consider the **duration of your experimentation** to finish the activities in time for results to be measured.

Evaluation methods are often insensitive to long-term effects of social and labour market inclusion for the most deprived (slow process). For instance, skills assessment, qualification obtained and shortening of the integration pathway can usually complement pure job integration objectives for people very far away from employment.

**Question yourself** about the use of these results: are they for external use (communication, fund raising, awareness raising) and/or internal use (organisation learning and capacity building)? Who will be the audience receiving your evaluation results, European or national? What type of stakeholders (policymakers only, other peers or general public)?

Assess your **evaluation capacity with regards to your resources** (budget, time, skills). Rigorous scientific evaluations are time consuming and budget intensive.

## 2. CHOOSE YOUR EVALUATION STRATEGY AND METHODOLOGY

### 2.1 Select an independent evaluator, assess resources needed

- a) Evaluation is a highly technical field requiring specific skills and social experimentation means complex systems. As recalled by many projects, stakeholders are not evaluation experts. The importance of evaluation needs to be explained and the whole partnership awareness raised. Relying on the early involvement of an experienced evaluator can help overcome the lack of skills to properly design and conduct social evaluation identified as a weakness by some projects.
- b) Projects highlighted important criteria to choose the evaluator: scientific production and prior involvement in evaluation projects; a good knowledge of evaluation techniques, including counterfactual impact evaluation; an experience in empirical data analysis and a good technical knowledge of the topic.
- c) Independence from implementation is crucial to the scientific credibility and integrity of evaluation findings. However, this does not prevent the evaluator from being a partner, a choice made by **FORWORK**, for instance.
- d) Several projects advise to co-design monitoring systems and evaluation strategies at proposal stage with the evaluator. Evaluators also need the expertise from the partnership.

### 2.2 Choose your evaluation method

**To assess the effectiveness of your experimentation there is no one-fit-all evaluation method;** the design and choice of the evaluation method should be fit for purpose and context in each application. **However, Counterfactual Impact Evaluation (CIE)** was used by half of 2014-2020 Easi projects, strongly recommended by the EC.

“CIE is a method of comparison which involves comparing the outcomes of interest of those having benefitted from a policy or programme (the ‘treated group’) with those of a group similar in all respects to the treatment group (the ‘comparison/control group’), the only difference being that the comparison/control group has not been exposed to the policy or programme. The comparison group provides information on ‘what would have happened to the members subject to the intervention had they not been exposed to it’, the counterfactual case”.<sup>11</sup>

CIE is appropriate for **large, homogeneous and very well defined target groups**. It provides especially strong reliable quantitative results, useful to build on your case. Practical guidance and examples are provided

11 [EU Science Hub: https://ec.europa.eu/jrc/en/research-topic/counterfactual-impact-evaluation](https://ec.europa.eu/jrc/en/research-topic/counterfactual-impact-evaluation)

in the “Wroclaw Social Experimentation Guide”, for instance. One limit of CIE raised by some projects, like **INNOVCare**, relates to an ethical dilemma, knowingly depriving regular beneficiaries from accessing a new service that would be beneficial to them.

See also [FORWORK](#), [InCare](#), [I-CCC](#), [MASP](#) for combined qualitative and quantitative evaluation methods.

Recognised for its strong quantitative results, CIE sometimes **insufficiently covers more qualitative effects, which are** also very important. CIE is thus often undertaken alongside other evaluation methods.

**TSUNAMI (2015)** has conducted a counterfactual evaluation using RCT (Randomised Control Trial) of its model twelve months after its implementation. The evaluation has also been complemented by a qualitative study based on interviews, aiming to examine improvements in beneficiaries’ motivation, willingness to work and general mental health. The project team believe that these might be factors hinting at positive long-term effects. First results of the project’s impact evaluation: participation increases the chances of doing a traineeship, not the employment probability. While the impact evaluation has not shown statistically significant improvements in employment, combined with the qualitative study, it has demonstrated significant non-tangible improvements in the target groups’ mental health and general motivation. These results served as an important argument that the project team has used to secure additional funding for further upscaling.

**Other evaluation methodologies** are used when the necessary homogeneity of context and target group are not met to undertake a counterfactual impact evaluation, in particular when **pilots are implemented in different contexts, different countries** (all 2016 transnational cooperation projects). For example, process-oriented evaluation methods, focusing on the ongoing process rather than only the final result or output can be used ([RIAC](#), focusing on a pre-post measurement of critical success factors (initial conditions for the target groups, success drivers, outcomes) collecting 283 questionnaires from employers, refugees and migrants from two sites, confirms the effectiveness of the model compared to the traditional services).

**The cost efficiency of your pilot** is also a very strong argument to convince policymakers to upscale your solution, especially in times of public budget restrictions. This implies **comparing the average cost of your pilot to existing similar solutions**, which is often tricky because there is no exactly similar approach to yours which by definition has never been applied before in your context. The majority of EaSI projects struggled with this assessment, but some managed to deliver detailed cost efficiency results by identifying and combining costs of relatively or partially similar projects. Often **negative short-term effects** (e.g. higher staff, training, administrative costs) are weighed against **positive long-term effects** (e.g. lower dependence of end beneficiaries on social services).

See other concrete estimations of cost savings compared to existing solutions

**TSUNAMI** compared costs to a programme of the regional government similar to **TSUNAMI**’s objectives (cost savings of approximately 23%).

**HELP** significant indirect public savings through its positive effects on clients and a more efficient allocation of existing resources (fiscal benefits).

**Bridge to Business** cost savings per participant of approximately EUR 2,000 compared to similar projects.

Assessing the cost efficiency is easier when the innovation solution combines existing services than when creating totally new ones.

**INSPIRE (2015)**, intends to respond to specific needs of the City of Rome's vulnerable people, to extend the provided social services and to enlarge the number of users so far excluded due to lack of economic resources. It aims to establish a virtuous cycle starting from the need of care for social fragilities and reaching the goal to 'activate' all the involved stakeholders, including fragile users and proximity networks.

In addition to the counterfactual impact evaluation, the project was subject to an independent efficiency assessment, the results of which were published in a separate study. The possible effects of the larger-scale adoption of collective services and the fallout in terms of demand satisfaction have been identified and described. The evaluation shows that the new proposed composition of services reduces waiting lists for social services with the same financial resources and that by shifting hours from traditional services to Inspire project services, the pilot achieved cost savings. The project team estimates that savings of 12% and 20.5% could be achieved by increasing the share of shifted hours to 20%. There was also a reduction in costs of collective services."

## 2.3 Build indicators and targets and how to collect data

**Relevant indicators** are specific for each project; no standard list of indicators is possible; however, some interesting databases can help you starting (see toolbox).

- For each intended result and impact define **indicators**:
  - o **Quantitative indicators** (employment rate, integration pathway duration, access to housing) which are often built specifically for the project (for instance, quality of life of older people dependent on social services based on the number of staff available in a care centre and the number of days from the request of support to its provision).
  - o **Qualitative indicators** (quality of life, empowerment, personal autonomy, working relations quality, social well-being).
- **Remain proportionate**, do not define too many indicators and select the **most robust and result-oriented ones**.
- Define indicators at the very beginning to be able to start with a **baseline data** that provides the reference point against which subsequent progress can be assessed, especially when not using a CIE.
- **For each indicator define your quantified targets** (KPIs or others) and go back to your needs assessment and scoping to ensure they are realistic.
- Data collection strategy is fundamental for both monitoring activities and evaluation purposes:
  - o **Identify** the stakeholders to be involved in data collection and ensure the **availability and accessibility of data** for these indicators; collecting data with some target groups can be challenging (localisation, language, social situation).
  - o **Select the tools to be used** such as interviews, surveys, living observation, existing data search and **when** (at the beginning and at the end or on a regular basis, notably to allow adjustment during the implementation timeframe).

Again, this is particularly challenging when pilots are implemented in different contexts, preventing reliable comparability of data and often resulting in biases, as confirmed by EaSI projects with a transnational cooperation dimension.

## 2.4 Draw conclusions

- a) The analysis of data and findings by the independent evaluator needs to be discussed with the whole partnership and if possible with the target group. Interpreting the data analysis in relation to your initial objectives to assess what works or not, why and how you will use these results should be a collective decision.
- b) Conclusions can have external and internal consequences. They sometimes result in projects' modifications and improvements, even during the lifespan of the project when the evaluation is

ongoing and provide information at mid-term. Facing a lower uptake of participants than expected, for instance, some projects had to adjust the target group criteria selection. Causality can be hard to prove because the situation of the final beneficiaries is impacted by multiple factors (living conditions, health problems, etc.).



## TIPS FROM PEERS!

*“Think about available data sources, such as public administration data, and the best way to build a data collection strategy.”*

**FORWORK project team**

*“In order to use counterfactual evaluation methods, it is important to have a good sample size, as results observed on small samples may be weak and erratic. The counterfactual evaluation is useful to identify causalities, although it should be completed with other perspectives, i.e. classical criteria of adequacy, added value, etc.”*

**ERSISI project team**

*“If impact evaluations are applied to complex social contexts the methodology should successfully mix a data baseline of both qualitative and quantitative elements. This combination of dimensions can better observe the different factors contributing to the impact expected”*

*“Even project’s failures can be of great use.”*

**TSUNAMI project team**

*“Involving an experienced evaluator at proposal phase is key, a lot of time is dedicated to setting up monitoring and evaluation systems, but it is worthwhile.”*

**I-CCC, TSUNAMI and FORWORK project teams**

### RESOURCES BOX

[The methodological guide to social policy experimentation](#)

Overview of the necessary steps for conducting a rigorous experimentation measuring the impact of a policy intervention

[Evaluating social innovation to create lasting change](#)

Findings and reflections across three categories of evaluating innovation programmes: early stage, scaling stage, larger or more complex evaluation – NESTA 2020

[Standards of evidence](#)

Overview of the Nesta Standards of Evidence, an approach used to measure the impact of a range of our practical innovation programmes and investments – NESTA 2013

[Evidence-based social services: toolkit for planning and evaluating social services](#)

Toolkit to support practitioners in planning services and evaluating local social services Review of international evidence-based social work databases

<a href="#">Better Evaluation website</a>	One of the most comprehensive evaluation resources available online A global collaboration aimed at improving evaluation practice and theory through co-creation, curation and sharing information
<a href="#">Integrated methodological framework for evaluating social innovation in rural areas</a>	H2020 SIMRA project “Social innovation in Marginalised rural areas” <a href="#">Database of Analysed Frameworks, Approaches, Methods and Tools for Evaluation</a>  <a href="#">List of Identified Frameworks, Approaches, Methods and Tools for Evaluation</a>
<a href="#">A Review of Evaluation Methods Relevant for Social Innovation</a>	<a href="#">H2020 TRANSIT project</a> “Transformative social innovation theory” Monitoring, social impact measurement, social return on investment (SROI), formative evaluation, summative evaluation, developmental evaluation
<a href="#">Urban Innovative Actions (UIA) evaluation approaches</a>	Monitoring and evaluation practices: UIA lessons learnt in the field of sustainable urban development
<a href="#">Social impact evaluation and indicators, INTERREG Alpine Space</a>	ASIS - Guideline #1 - Social impact evaluation and indicators: quick overview of social impact evaluation and indicators issues to public actors of any field Pragmatic approach, organised around 10 FAQ generic questions --Oxalis – June 2020
<a href="#">Approaches, ToR and methods for impact evaluation – Interact Q&amp;A</a>	Practical document which aims at supporting the Interreg programmes in their planning and implementation of impact evaluations in the 2014-2020 programming period
<a href="#">Observatory of Public Sector Innovation - OPSI</a>	Not specifically on social innovation and experimentation but useful to access international case studies, research and innovation tools on public policy innovation

## INDICATORS

<a href="#">European Innovation Scoreboard 2021</a>	<a href="#">European Innovation Scoreboard 2021</a> provides a comparative analysis of innovation performance in EU countries, other European countries and regional neighbours
<a href="#">Social scoreboard of indicators on social rights pillar</a>	Eurostat renewed list of headline indicators (equal opportunities, fair working conditions, social protection and inclusion) – searchable by country, region (NUTS2), by degree of urbanisation
<a href="#">Regional Innovation Scoreboard (RIS) 2021</a>	<a href="#">Regional Innovation Scoreboard (RIS) 2021</a>
OECD Better Life Index	Index to visualise and compare some of the key factors (like education, housing, environment, etc.) that contribute to well-being in OECD countries Interactive tool that allows to see how countries perform according to the importance given to each of the 11 topics that make for a better life



## Section 4: Scaling up and Transfer

The ultimate goal of social experimentations, if successfully tested at small scale, is to be “implemented in other contexts including geographical and sectoral ones or implemented on a larger scale”.<sup>12</sup>

- **“Implementation in other contexts” refers to the transfer** of social experimentations, either territorial (to another city, region or country) or to a different sector (from health sector to social services sector or from business to education, for instance). The transfer of social experimentations between countries is strongly supported by transnational cooperation.
- **“Implementation on a larger scale” refers to upscaling**, which means expanding the scope of small-scale new solutions, often to an upper level, from local to regional, national, and/or European levels to reach a higher number of beneficiaries (vertical process).

In practice, the distinction is often blurred. **In all cases, the aim is to produce a wider positive social impact, benefitting more people, organisations and/or territories**, at the scale of the social needs identified. Social policy experimentations, when tested positively, are meant to be eventually embedded and mainstreamed in public policies or systems.

However, upscaling and transferring of successfully tested pilots are the weakest steps of the whole social experimentation process. **Planning ahead** these ultimate steps, which are also the final objective of your social experimentation from the beginning is instrumental, even if concrete upscaling and transfer implementation are often beyond the scope of the social experimentation project and materialise once the project is closed. It implies envisioning the upscaling/transfer from the start and keeping it in mind throughout the whole project life cycle.

### 1. PARTNERSHIPS' CONTRIBUTION

**Sustainable and relevant partnerships are crucial for the transfer and upscaling phase**, a strong element in the EaSI programme (see sections 1 and 2).

Identify all **stakeholders, who are likely to contribute to the transfer/upscaling** of your pilot, either to implement the solution at scale themselves or acting as brokers with other stakeholders who can expand your solution. Fill the gaps in your project partnership, or associate them, either formally or informally.

Your project partnership and complementary cooperation beyond the consortium with other stakeholders should reflect your specific project upscaling or transfer plans. Try to **include in your project partnership the most important stakeholders** with the power, willingness and capacities to upscale and/or transfer and shape relevant policies based on your successful pilot.

Develop a **supporting context from the start** to increase your pilot potential upscaling and/or transfer by generating stakeholders' interest at the start and beyond regular information; involve them actively by carrying out consultations, working groups, workshops, site visits, among others.

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<sup>12</sup> REGULATION (EU) 2021/1057 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 24 June 2021 establishing the European Social Fund Plus (ESF+).



## PARTNERS TO UPSCALE YOUR INNOVATIVE SOLUTION AT A DIFFERENT POLICY LEVEL

**Policy makers' engagement** is essential and highly increases the chances of an efficient upscaling when planning to **upscale your innovative solution at a different and higher policy level**. Upscaling to an upper level can be a long process and sometimes it is quicker and easier to transfer to other similar local levels within the same country (approaches do not exclude each other).

- Make sure you **involve policymakers with the right level and necessary competencies** in relation to your upscaling plans. It varies between countries, pay special attention to this in case of transnational cooperation. Do not forget that a **change of political power following elections, for instance, can prevent the upscaling process**, in particular for sensitive areas like migration, modifying policy and funding priorities, as it was the case for [FORWORK](#). Think of a plan B (transfer to other countries) and involve public administration services, which may be more stable.
- **When policymakers are not members of the partnership**, involve them as early as possible, not at the end during the final conference and dissemination of evaluation results. Projects experiences demonstrate that the lack of political will and of available funding at local, regional and national levels are big obstacles and create resistance to change.
- **When the experimentation results from a policy demand**, policymakers often lead the project in order to test the effectiveness and efficiency of options before deciding on a regional or national policy reform. The political context is then favourable. Projects of that type often result from calls dedicated to national reforms. Sometimes, a legal framework necessary for the implementation of the pilots is even introduced ([PACT](#), [ERSISI](#)). The following example illustrates these favourable conditions.

### Upscaled projects examples led by policymakers:

2014: [PACT](#) (Castilla y Leon Regional Government), [INSPIRE](#) (Rome)

2015: [HELP](#) (Westminster), [ERSISI](#) (Navarrese Regional Government), [ESTI@](#) (Athens), [MISSION](#) (Kortrijk), [TSUNAMI](#) (Piedmont Regional Government)

**RESISOR** (Regional Single Social Record) pilot aimed at preventing fragmentation of the social services information management systems in the Spanish region of Andalusia. The pilot created a one-stop-shop system (Regional Single Social Record – RSSR), recording complex citizens' social data (healthcare and all social data), stored in one place and easily accessible by both citizens and social service professionals, using various types of software developed with the EaSI support.

The pilot was planned as a part of the regional effort to update the information system following the changes in the regional legislation in the area of social policies, designed with the goal to upscale at regional and national levels. The Regional Ministry of Equality and Social Policies (RMESP) of Andalusia was the main beneficiary of the project. The project team had an opportunity to act within a special legal framework drawn upon by the regional government for the implementation of the **RESISOR** concept, with a strong administrative and political support from the regional ministries, as well as from the local policymakers involved for the vertical integration of services.

A comprehensive upscaling strategy for the pilot was designed, the White Book of the RSSR establishing the roadmap for the future of the RSSR and its extension to the overall public and private system of social services in Andalusia.

The project was successfully embedded at regional level, and further upscaled in a system called "CoheSSiona", aimed at further fostering cohesion of the social service systems across various Spanish regions. The regional governments of Asturias and Canary Islands already expressed their interest in replicating the experience of **RESISOR**. According to the project representative, their current upscaling plans were also endorsed by the national government in 2019-2020.

**One side effect** of social experimentation seeking to only address specific regional or national challenges is that most of the times, they do **not plan any transfer**. Consequently, the conditions and mechanisms of those proposed models/approaches are often not described in sufficiently precise and practical ways to be easily adapted in new contexts.

## PARTNERS TO TRANSFER YOUR INNOVATIVE SOLUTION IN OTHER CONTEXTS

Transfer of innovative solutions to different territories or sectors is challenging due to the context-specific nature of social experimentation. Building a transnational partnership, composed of partners from different countries, is the most common option used when planning transfer between EaSI participating countries.

**If you are planning to test a solution, model or approach intended to be applied at EU level**, in all or most countries, implementing pilots in several countries will help testing different contexts and will facilitate the standardisation of your model. Implementing contexts should be comparable and partners should have the same functions and competencies to allow for comparisons (ETS). **Involving an EU network** (Red Cross, Metropolisnet, EARLALL are examples from EaSI projects) **or creating a new one** offers the necessary structure for such a wide coverage and can be supported by advisory groups with representatives from different countries to ensure the development and dissemination of a transferable solution ([INNOVCare](#)).

[INNOVCare: European Network of Resource Centres for Rare Diseases](#)  
– [RareResourceNet](#)

**If your transnational partnership develops pilots in different countries, but very different ones**, this will result in a range of innovative solutions rather than one EU model or approach, more difficult to transfer. Having the same type of partners is not sufficient to ensure comparability. If the solution has the same specific characteristics (target group, service, process) and is tested with pilots in different countries at the same level, with partners having the same precise functions and roles, like [RIAC](#) and ETS, it allows for comparison and strengthens the potential for upscaling to more different contexts. However, a European methodology can be tested in different pilots if sufficiently detailed as shown by [FAB](#) (see below).

**When the transfer is one of the main goals of the social experimentation itself**, taking place during project implementation ([UNIC](#), Move & Smile, [ALMIT](#)) between project partners, try to connect to similar contexts and partners in other countries to raise their interest and potentially expand the upscaling at the end of the experimentation.

Use your transnational partnership to allow exchanges and mutual learning between partners, which can even result into developing additional new solutions, models, services and this ongoing and in-depth cooperation during the project lifetime being useful to create sustainable partnerships.

## 2. SCALING AND TRANSFER PLANS

Upscaling and transfer of your innovative solutions is your goal from the beginning, so you must think about it from the onset. Your hypothesis is that your solution, or part of it, is relevant beyond its initial pilot context. The biggest challenge for most projects is to find **how to transfer their innovative solution or some of its key features to other contexts, in other countries**, especially for very context-specific innovations.

**Your role is to prepare for the upscaling and transfer, to support** it by developing plans for upscaling/transfer at the earliest stage of the pilot implementation. Even if the practical upscaling or transfer is implemented once your project is closed and it is not your team who will be responsible for these steps; you must develop a **strategy for scaling or transferring** with your partners and define **what** you intend to scale/transfer and **how** you will do it.

**When the demand for the new solution is clear and identified**, for instance in the case of social experimentation developed to inform regional or national reforms, the upscale of the whole solution must however be carefully planned.

**RuralCare** “planned the upscaling process from the start of the project into various steps: pilots will cover a territory of 74 local councils in the province. If proved successful, a feasibility study will be conducted for the extension of **RuralCare** to the whole Castilla y Leon region, as well as a roadmap for its implementation. Then, the model and the results from the project will be presented to other autonomous regions. The last step of the upscaling process will be to influence a national policy reform of long-term care. This goal requires ensuring that adequate public budgets are available.”

**Transferring** an innovative solution, even partially, **requires adapting the model, approach, service or product to its new context.** Pure replication is impossible, and this adaptation needs both the social experimentation team and the receiving context to exchange and mutually learn and understand each other’s context and framework conditions. **FAB** developed a model to transfer and adapt local tested good practices between cities that proved successful by having supported the transfer of five local practices between partners.

**FAB – Fast-track Action Boost** project (2016) responds to the needs of the refugees and asylum seekers for a better and faster integration in the labour market with a special focus on women, as well as the needs of cities to improve and better deliver job inclusion services for refugees. This was implemented through developing and testing a Transfer and Adaptation methodology (TAP model) of relevant and tested local policies, measures and practices. Pilots were tested in five European cities (Milan, Berlin, Stockholm, Vienna, Belgrade). **FAB** partnership was composed of eleven partners from six City Administrations.

TAP methodology was used, tested and improved during the pilots’ implementation. The project successfully transferred five local initiatives between European cities. This successful transfer, in addition to the positive evaluation results, demonstrates the validity of the TAP model and methodology that could be useful for many EaSI projects wishing to transfer their solutions, at least partially.

**The TAP model is based on knowledge sharing and peer-mentoring:**

**Knowledge sharing** is the core element of the project. Through research and study visits, partners review and benchmark city models in place, resulting in a set of successful existing practices in each city, proposed to the other partner cities. In total, 22 good practices were identified.

The “receiving” city then selects the practice that best fits its local needs, capacities and context to implement it as a pilot.

**The peer-mentoring system** is an in-depth cooperation between the city of origin and the receiving city. This process ensures the adaptation of the practice in its new context. It encompasses the whole transfer process of measures and practices into partner city local pilots and is composed of integrated steps such as:

- The Transfer and Adaptation Plan (TAP)
- Local Empowerment Workshops
- Mentoring visits
- Curriculum for the train of trainers (ToT) and implementation framework

Some of the pilots transferred are already embedded at local level (Vienna and Stockholm), following their adaptation to their new contexts.

**In many cases, the “demand” for your solution is not that clear at the beginning** and your “offer” of a new solution has not yet raised potential interest. The need to develop an upscaling and transfer strategy is even stronger in this case, otherwise, your social experimentation will remain isolated and unused even if having proved successful.

- **Who can benefit from your solution in your country or in other contexts? Who is facing the same social needs and where?** Try to establish contacts with these potentially interested actors

(public authorities, professional organisations and networks, social partners, private sector or civil society organisations) raise their interest and exchange to identify what is of interest for them and under what conditions.

- **What are the elements of your solution that are transferable/scalable?** Do not forget that a transfer can be partial or total (approach, tool, model, practice). You might have elements easier to transfer than others.
- **How to support the transfer?** As said, upscaling and more importantly transfer require a more or less extensive adaptation to the new context. The more specific your solution is to your context, the more difficult the transfer will be. Therefore, you need to anticipate this necessary adaptation and codify, provide clear guidance for using your new solution in different contexts, document the service/product model in greater detail and explain the necessary conditions under which it can work.
- Pay great attention to the transferability of your solution, including its **costs** (provide a basis cost analysis).

These upscaling and transfer plans will be updated and sometimes revised throughout the whole pilot implementation process, based upon your own experimentation of what works or not, why and under which conditions. The evaluation will complement this knowledge and should integrate this upscaling/transfer dimension.

However, **do not forget that transfers can be partial**, and you can transfer the approach, a model, a methodology, tools or even a governance model ([TSUNAMI](#)).

### 3. EVALUATION RESULTS DISSEMINATION STRATEGY.

The majority of EaSI projects successful in upscaling or transferring their solutions highlight the **power of robust evaluation results** to convince policymakers or other stakeholders to develop the experimentation at a wider scale. Positive evaluation results are your most powerful argument for transfer and upscaling, **a necessary condition but not sufficient if not supported by a well-planned and targeted dissemination strategy at the beginning**, based on the elements of your upscaling and transfer plans. Waiting for the evaluation results to define your dissemination strategy will be too late.

- **Your initial audience** are normally defined in your upscaling and transfer plans, revise and enlarge them if necessary.
- Use **communication tools and language adapted** to the audience you want to reach. For a EU level audience some important messages and documents should be available in English. Creating a website and using social media is useful if they are regularly updated, lively and easily accessible. Outreach and awareness raising campaigns are useful at the beginning of the social experimentation.
- **Plan different types of events** to inform and mobilise possible policymakers, organisations, investors, who are already or could be interested (workshops, study visits, small thematic or territorial events with various stakeholders). Do not only rely on a final conference to disseminate your results, even at EU level with a wide audience that you do not know, especially with online conferences now more common where personal interactions are not possible. They can provide new contacts but often follow-up and feedback are hazardous.
- **Participate in events organised by other stakeholders working on the same topic.**
- **Ensure the long-term accessibility of your results**, which is not the case when projects websites' are no longer functional. They can be disseminated through partners and interested stakeholders websites, which is more sustainable, and can also be published in online repositories.

**InCARE**, since its onset, has carried out a series of consultation procedures and exchange workshops where actors from the local to the national level, including policymakers, have been involved. While pilots are implemented at local level, national stakeholders will be informed about the state of play of the project in view of scaling up. The project team plans to target service providers, care users and their families, carer organisations, older people organisations, NGOs and policymakers, but also to reach out to research organisations, especially applied research.

## 4. RESOURCES FOR CHANGING SCALE AND TRANSFERS

Implementation at a wider scale or transfer to other contexts happens at the end of the social experimentation, once results are proved positive. Very often, this transfer and upscaling step will be undertaken by other project teams, organisations and public authorities, in collaboration with the social experimentation team or some of its partners. New resources will be needed for this phase and looking for new funding does not only and automatically rely on the project team. But it can be interesting for the project team to seek for additional funding to secure further developments of its new solution, to avoid gaps between the end of the experimentation and its upscaling or transfer.

**Upscaling innovative solutions** is normally funded by national, regional or local budgets as part of their mainstream policies and programmes. Initially, the **ESF support** from national and regional operation programmes, complementing national/regional/local funding, was intended to support social experimentation domestic upscaling. This proved difficult and rare projects managed to obtain ESF support.

**INSPIRE** have secured funding from the **ESF Italian National Operational Programme (NOP)** on Governance and Institutional Capacity (2014-2020). This is the result of the project's evaluation showing superior effectiveness to the existing system of social services provided for fragile people in Rome. It also owes a lot to the involvement of Rome local communities raising awareness about the pilot implementation and their dissemination strategies.

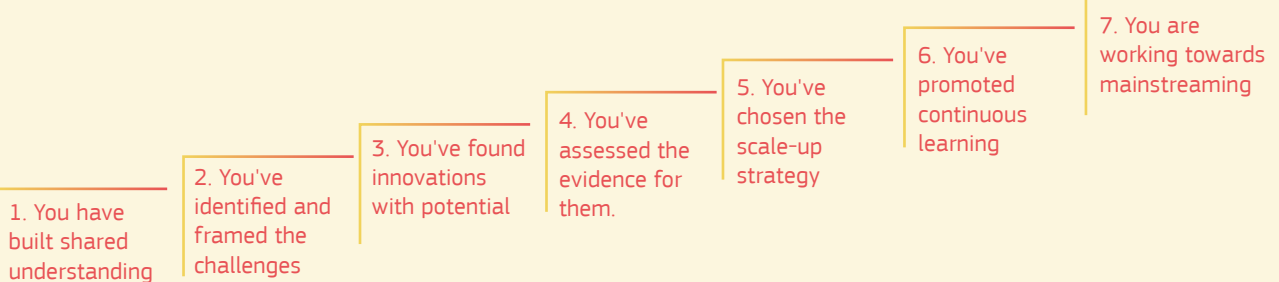
**ESTI@** has attracted an additional €6m from ESF to convert three more municipal health centres into Single Entry Points (SEPs), based on the positive results of the pilot.

In addition, the first SEP continues to operate and obtained €2m from the EEA and Norway funds. Another SEP remains in operation but with the financial support of the municipality.

In the 2020-2027 programming period, ESF support for social innovation is reinforced and will boost the use and scaling of social experimentations. Each Member State is required to dedicate at least one priority in their national or regional programmes to support social innovation and social experimentation and/or strengthen

### IMPORTANT TO NOTE!

To help the Members States to use ESF+ resources for scaling-up social innovations in a strategic way, the Commission has published a guide "[Scaling-up Social Innovation - seven steps for using ESF+](#)". This pragmatic guide has been co-created with Managing Authorities and stakeholders within the ESF social innovation Community. To go deeper into scaling, transfer and systemic change, have a look at this guide



bottom-up approaches based on partnerships between public authorities, the private sector and civil society (article 14 of the ESF+ Regulation).

**Transfer of social experimentations between countries** is rarely supported by national funding, not often supporting social experimentation and even less with an EU dimension. Some projects applied for **other EU funded programmes** to fund the transfer of some of their key components, such as ERASMUS+ for methods or tools related to education and training ([SIPA](#)) or AMIF for projects working on migration issues. But many more EU funded programmes could eventually support further development or more research, such as Horizon Europe.

Finally, the ESF+ created new mechanisms to support transnational cooperation in order to accelerate and facilitate the transfer and the scaling of innovative solutions and new types of grants will be allocated.

In addition, national EaSI contact points should be operating in 2022, with helpdesk, website, events and webinars.

National social innovation competence centres are being created and in the coming years they will provide professional support to social innovators, including tools and methods for achieving and scaling social impact, supporting transnational exchange and networking.



## TIPS FROM PEERS!

*“The projects should include results presentation processes to create the conditions for the transferability of the evaluation to public policies.”*

**[ERSISI](#) project team**

### RESOURCES BOX

<a href="#">Making it big</a>	Strategies to scale social innovations (NESTA)
Strategy to scale social innovation for development Toolkit May 2020	Hands-on report for UNDP Accelerator Labs to enable context-specific scaling of social innovation to achieve the SDGs
Literature Review Scaling Social Innovation Internationally	H2020 TRANSITION project
<a href="#">THE BENISI SCALING GUIDE</a>	Accelerating the Scaling of Social Innovations
Scaling-up Social Innovation – Seven steps for using ESF+ <a href="#">LINK</a>	A pragmatic guide for Managing Authorities and other stakeholders (see above)

# Guiding questions for the Social Innovation Guide

*Envision your social experimentation Canvas*

## 1. SOCIAL NEEDS

How do you identify specific unmet or badly met social needs your experiment aims to address?

**CONTEXTUALISE:** What is specific about the unmet social needs your project aims to address in your context, in comparison to the overall EU challenge from the call?

Rigorous description of the social needs (scope) you aim to address in terms of:

- target group/end-users/final beneficiaries
- sector and/or territory concerned
- nature/type of the unmet needs

Is it a new/recently emerged need or an existing need never satisfactorily answered?

**DEMONSTRATE:** How do you know this need is not covered or it is badly covered?

Evidence it through thorough search for examples of similar projects, programmes, policy interventions conducted domestically or abroad through:

- Surveys
- Statistics
- Territorial diagnosis
- Others

Do you plan any survey, studies, interviews at the start of your experimentation to better identify needs?

Do you plan to use some results from previous interventions as a source of inspiration or integrate them in the new pilot (approach, solution, partnership, other)?

**SHARE YOUR DIAGNOSIS:** Is your assessment of social needs shared by other key stakeholders?

Are social needs resulting from policymakers' demand? At which level? From whom? In view of a reform, a new programme? By when?

Are the social needs resulting from a demand expressed by the end-users? How? Are there other stakeholders concerned (practitioners, service providers)?

## 2. INNOVATIVE RESPONSE

How will you address these social needs in an innovative way?

### NATURE AND INNOVATIVENESS OF YOUR SOLUTION

What will your solution develop and implement? Is it:

- a new service
- a new process (way to deliver a service)
- a new organisation
- a new product

Are they combined?

What is the precise scope of your small-scale experiment?

- All or part of the target group facing the social needs identified? Specific characteristics?
- All or part of the territory/sector concerned by the social needs?

How innovative is your solution compared to already existing ones?

- New to the target group
- New to the territory
- New to the sector
- Radical or incremental innovation? Are some results from previous interventions used as a source of inspiration or integrated in the new experiment (approach, solution, partners, other)?

### INNOVATIVENESS OF YOUR PROCESS

How do you involve the target group in the innovative solution design and delivery (directly or indirectly)?  
What is their role?  
How do you involve policymakers in the innovative solution design and delivery? What is their role?  
Do they have the power to support sustainable changes?  
How do you create new relationships or collaboration between stakeholders (public, private, civil society)?

### 3. EVALUATION OF RESULTS AND SOCIAL IMPACT

#### TARGETED RESULTS AND SOCIAL IMPACTS MEASUREMENT

What results do you want to achieve with your project, what will be improved, at the level of:

- the target group
- the organisations
- the territory/sector/policy?

What social impacts do you want to achieve with your project at the level of:

- the target group
- the organisations
- the territory/sector/policy?

In order to prove that your experimentation is successful:

- What are the most important results you want to measure? Prioritise.
- What are the most important social impacts you want to measure? Prioritise

#### EVALUATION METHODS CHOICE

What evaluation methodology will you choose?

- Counterfactual impact evaluation? Others? Combination?

Why is it the most relevant for your project?

Which criteria will you use to select an independent evaluator?

#### MONITORING AND EVALUATION INDICATORS CHOICE How will you measure your results and social impacts?

How will you choose the indicators (quantitative and qualitative)?

How will you collect data to build the indicators? When?

- Administrative data
- Surveys
- Interviews
- Others

Do you have some baseline data for comparison purposes?

#### STAKEHOLDERS INVOLVEMENT

Who are the stakeholders needed for the evaluation?

- Among partners / outside the partnership?
- At what stage?

How is the target group actively involved in the evaluation?

- At what stage?
- What is their role?

Will you share and interpret the evaluation results with the stakeholders and the target group?

#### EVALUATION IMPLEMENTATION



Who will collect, analyse and interpret the data and produce evaluation results? What are your available resources (time, skills, money, etc.)?

#### 4. SCALABILITY / TRANSFERABILITY POTENTIAL

##### DISSEMINATION STRATEGY

Who will you share the evaluation results with in order to scale-up and/or transfer your innovation? What do you want to achieve?

##### SCALING AND/OR TRANSFER?

##### How do you envision the growth of your social experimentation's impact?

- Domestic scaling/transfer (same country): other territories, other organisations, other sectors, other target groups?
- Transfer to other contexts, in other EaSI participating countries?
- Upscaling (to other levels): from local to regional, to national, to EU levels?

##### What element(s) of your social innovation do you intend to be transferred/upscaled (supply)?

- Product/service/programme?
- Organisational models?
- Methodology, process?

##### Context and conditions for transfer/upscaling?

- In which context could your social experimentation be useful/used/applied?
- What conditions should the new context meet, in order for your innovation to be adequately transferred/upscaled?

##### Who can be interested? (demand)

- Have you identified other potentially interested territories, organisations, sectors, target groups in your country or in other EaSI participating countries?
- How do you plan to engage with them?

##### Policy level transfer/upscaling:

How are you planning to specifically involve the policymakers that are relevant for the transfer/upscale of your innovation?

##### Resources and support needed for transfer and upscaling

Where will you get the resources and support needed to transfer /upscale your innovation? Do you plan to organise support to help others adapt your solution to their own contexts?

**ANNEXE 1:**

*EaSI 2014-2020 calls topics and awarded projects*

<b>CALL REFERENCE NUMBER</b>	<b>TOPIC</b>	<b>N. OF FINANCED PROJECTS</b>	<b>ALLOCATED BUDGET (BASED ON GRANT LISTS)</b>	<b>PERIOD</b>
VP/2014/008	Integrated delivery of social services	7	€10,489,387.51	2014-2017
VP/2015/011	Integrated social services for the integration in the labour market	8	€10,528,298.70	2015-2018
VP/2016/015	Fast track integration into the labour market for third-country nationals, targeting exclusively asylum seekers, refugees and their family members	5	€9,177,891.35	2016-2019
VP/2018/005	Innovative work-life balance strategies	4	€4,270,675.87	2018-2021
VP/2018/003	Access to social protection and national reform support	4	€4,751,940.29	2018-2021
VP/2019/003	Social innovation and national reforms - long-term care	7	€8,870,942.05	2019 - ongoing
VP/2020/003	Establishing and testing integrated interventions aimed at supporting people in (the most) vulnerable situations	9	€9,604,717	2020 - ongoing

Source: Consortium (2021) based on ToR and EaSI lists of awarded grants.

**ANNEXE 2:**

*EaSI projects full description (hyperlinks to fiches) – to be added once the fiches are finalised and the hyperlinks provided by DG EMPL*

CALL REFERENCE NUMBER	TOPIC/	PROJECT NAME
VP/2014/008	Integrated delivery of social services	<a href="#">Vouchers for the provision of child minders service to workers with nonstandard work schedules</a> <a href="#">Regional Single Social Record (RESISOR)</a> <a href="#">Family STAR – Family group conferences and Student At Risk</a> <a href="#">Entry for Empowered Working &amp; Living (E4EmPoWL)</a> <a href="#">Innovative Patient- Centred Approach for Social Care Provision to Complex Conditions (INNOV-CARE)</a> <a href="#">Innovative Services for fragile People In RomE. (INSPIRE)</a> <a href="#">ProActive Case-based Targeted model for social inclusion (PACT)</a>
VP/2015/011	Integrated social services for the integration in the labour market	<a href="#">MISSION: Mobile Integrated Social Services Increasing employment Outcomes for people in Need</a> <a href="#">Employment enhancement and Social services integration in Athens municipality (ESTI@)</a> <a href="#">HomeLab - Integrated Housing and Labour Services in the Social Rental Enterprise Model</a> <a href="#">Housing and Employment Learning Project (HELP)</a> <a href="#">TSUNAMI - A Traineeship as a Springboard out of Unemployment for those Affected by Mental Illness</a> <a href="#">Bridging Young Roma and Business - Intervention for inclusion of Roma youth through employment in the private sector in Bulgaria and Hungary</a> <a href="#">SIPA - Sites d'Information, de Projet et d'Accompagnement</a> <a href="#">Enhancing the Right to Social Inclusion through Service Integration (ERSISI)</a>
VP/2016/015	Fast track integration into the labour market for third-country nationals, targeting exclusively asylum seekers, refugees and their family members	<a href="#">FAB: Fast Track Action Boost</a> <a href="#">RIAC - Regional Integration Accelerators</a> <a href="#">FIER - Fast track integration in European Regions</a> <a href="#">FORWORK - Fostering Opportunities of Refugee WORKers</a> <a href="#">Acceleration of labour market integration of immigrants through mapping of skills and trainings. (ALMIT)</a>
VP/2018/005	Innovative work-life balance strategies	<a href="#">Development of microsimulation tools for social insurance projections (DEMTOP)</a> <a href="#">Establishing the European Tracking Service on Pensions</a> <a href="#">BELMOD</a> <a href="#">Modernizing Social Protection Systems in Italy (MOSPI)</a>
VP/2018/003	Access to social protection and national reform support	<a href="#">Men in Care (MiC). Caring Masculinities and the Role of Employers</a> <a href="#">MASP (previous name PaaM) Master parenting in work and life</a> <a href="#">EQW&amp;L - Equality for work and life</a> <a href="#">R.A.F.F.A.E.L Redesigning Activities in a Family Friendly way in VitErbo's workPlaces</a>

VP/2019/003	Social innovation and national reforms - long-term care	<a href="#">Supporting INclusive development of community-based long-term CARE services through multi-stakeholder participatory approaches (InCARE)</a> <a href="#">Towards User-centred fuNding models for long term Care (UNIC)</a> <a href="#">Improving autonomy and global well-being through Adapted Physical Activity - By Siel Blue</a> <a href="#">„Dać to, czego naprawdę potrzeba” - “To give what is really needed”</a> <a href="#">Addressing and preventing care needs through innovative Community Care Centres (I-CCC)</a> <a href="#">“Rural Care” - Integrated Social and Health Care in the home at Rural Scale</a> <a href="#">Community-based social service centers as a tool of multilevel partnership for providing long-term care in Slovakia</a>
VP/2020/003	Establishing and testing integrated interventions aimed at supporting people in (the most) vulnerable situations	<a href="#">4IM</a> <a href="#">C.O.P.E.</a> <a href="#">CRIS</a> <a href="#">Lone Parents</a> <a href="#">NOVA</a> <a href="#">Reticulate</a> <a href="#">Rights First</a> <a href="#">Un toit sur la tête</a> <a href="#">Xeitu</a>

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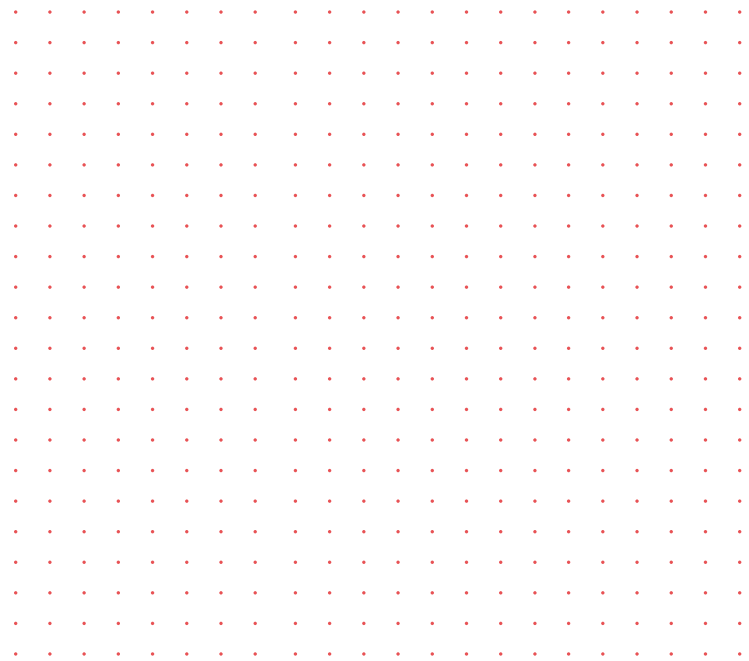
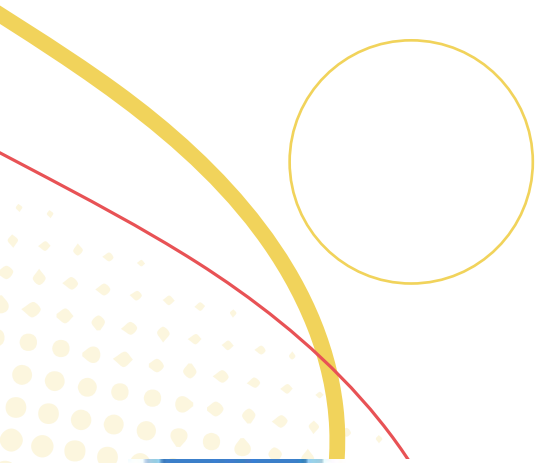
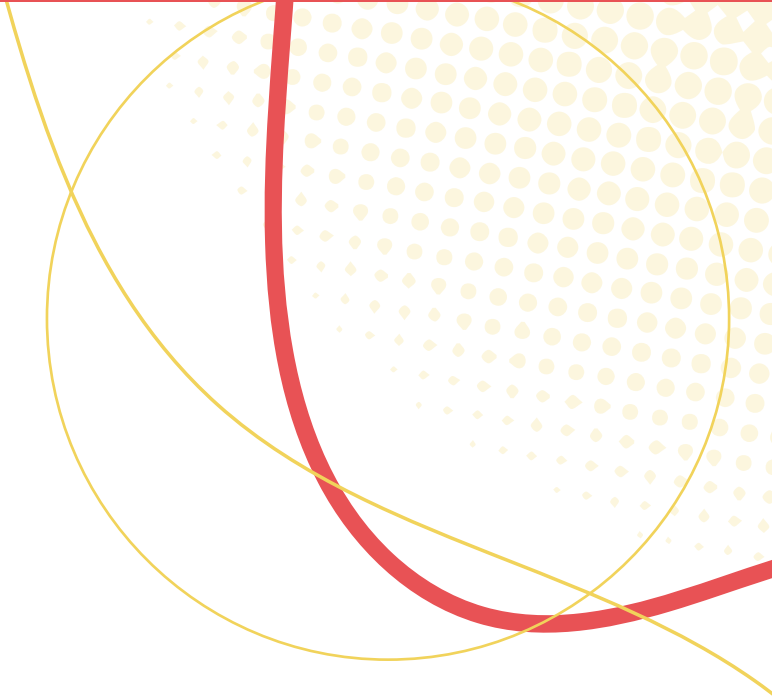
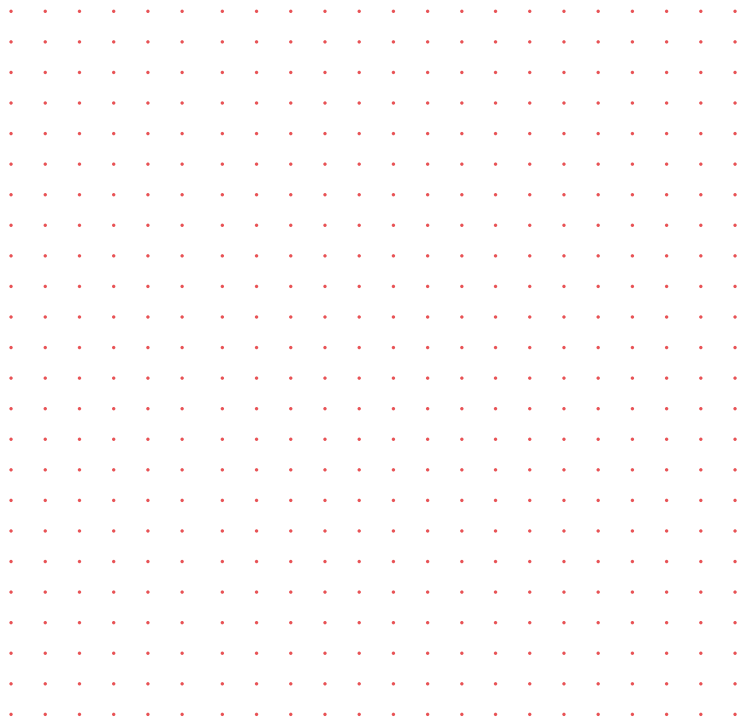
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