

# Practical Guide How to Set Up a Cluster of Social and Ecological Innovation (CSEI)

**Interreg**  
Baltic Sea Region



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This concept paper is prepared as part of the project  
Regional Ecosystems for Social Innovation and Social Transformation  
(RESIST) project

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# Table of Contents

|                                            |           |                                                            |           |
|--------------------------------------------|-----------|------------------------------------------------------------|-----------|
| <b>The RESIST Project</b>                  | <b>4</b>  | <b>C   The Process: Establishment of a CSEI</b>            | <b>36</b> |
| <b>The Concept of CSEI</b>                 | <b>5</b>  | 1   DESCRIBE the Starting Point of A CSEI                  | 37        |
| Introduction                               | 5         | 2   DEFINE Success Factors & Vision                        | 39        |
| The CSEI Concept                           | 6         | 3   DECIDE for Focus Dimensions                            | 40        |
| General Success Factors on Clusters        | 8         | 4   DETERMINE Goals per Focus Dimension                    | 41        |
| A Spider Diagram Model of the CSEI Concept | 9         | 5   DRAFT Steps & Measures                                 | 42        |
| <b>A   The Core Activities of a CSEI</b>   | <b>10</b> | Evaluating (Potential) CSEI                                | 43        |
| <b>B   Dimensions of the CSEI Model</b>    | <b>13</b> | <b>D   Examples of Existing CSEI Clusters</b>              | <b>44</b> |
| I. Viable Purpose                          | 14        | I. National Audit Union of Social Cooperatives (Poland)    | 44        |
| II. Cross-Sectoral Composition             | 17        | II. Hamburg Alliance for Social Entrepreneurship (Germany) | 47        |
| III. Coordinating Body                     | 20        | <b>E   Key Learnings from Practice</b>                     | <b>49</b> |
| IV. Operational Model                      | 22        | <b>Imprint</b>                                             | <b>51</b> |
| V. Membership Model                        | 26        |                                                            |           |
| VI. Portfolio of Services                  | 28        |                                                            |           |
| VII. Financial Model                       | 31        |                                                            |           |
| VIII. Stakeholder Collaboration            | 33        |                                                            |           |

# The RESIST Project

This concept paper on a prototypical CSEI setup was funded by European Commission's Interreg Baltic Sea Region Programme.

In the project RESIST (Regional Ecosystems for Social Innovation and Social Transformation), regional authorities, business support organisations and sectoral agencies develop a model of how to open up existing regional innovation ecosystems for social innovators and social entrepreneurs tackling societal and environmental challenges.

Social innovators and social entrepreneurs can play an important role in finding creative and unconventional solutions to current transformative challenges such as migration, the transition to a carbon neutral society, or digitisation. But to turn good ideas into practice they need help – in terms of qualification, funding and access to markets and cooperation partners. Regional public authorities, business support organisations and sectoral agencies in the Baltic Sea Region are already very effectively providing such support to mainstream innovators and entrepreneurs, but they have yet to realise the benefits of adapting their offers to the needs of social enterprises. The RESIST project supports these institutions in creating better and more supportive regional ecosystems for social innovation (SI) and social entrepreneurship (SE) and in making existing innovation support

more accessible for social entrepreneurs. The project partners explore the concept of “clusters of social and ecological innovation” (CSEI) as a model for fostering cross-sectoral collaboration, and they develop and test a programme to improve the capacity of innovation support actors to foster social innovation.

In the long run, the objective is to raise the number of CSEIs in the BSR and to facilitate cooperation between them. Throughout the process, the involved regions will also collect ideas and recommendations for improving the integration of social innovation in their regional innovation strategies.



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# The Concept of Clusters of Social and Ecological Innovation

## Introduction

The purpose of this concept paper is to describe the prototypical setup of a Cluster of social and ecological innovation (CSEI) and facilitate the establishment or evaluation of a regionally adapted CSEI.

In the first part, it explains the CSEI concept, presents the “core” as the foundation of any CSEI to be and depicts the steps to create an action plan for the establishment of a CSEI on a regional level. Hence, the process is not only applicable for developing a CSEI design from scratch but also for the evaluation of an already existing CSEI or any network that presumably could be classified as a cluster of this kind.

The second part presents the eight dimensions that can be used to describe any CSEI. That includes specifying membership and financing models, types of coordinating bodies or cluster organisations, and assessing how suitable they are for different regional and socio-economic contexts and strategic objectives. Furthermore, the paper will also present suggestions for designing other operational aspects of a functioning ecosystem, such as services

provided by the cluster, physical spaces or (digital) knowledge management & transfer, networking and matchmaking mechanisms between various organisations involved in (social) innovation generation, funding, education, marketing and awareness raising.

After these rather abstract specifications and recommendations, the guide concludes with observations from practice which are considered to be comprehensive and useful regardless of context and specific preconditions. The guide is aimed at everyone who helps shape, support, or implement a CSEI cluster in a region – especially cluster coordinators or backbone teams, public-sector partners working on regional innovation and social policy, ecosystem intermediaries (hubs, incubators, networks), social innovation and social entrepreneurship actors, funders, and key partners from research, business, and civil society who contribute resources, legitimacy, or routes to implementation.

If you are interested in starting a CSEI in your region or you know of a cluster-like organisation or network in your region that addresses tackles social and ecological innovation, this guide is for you!

# The CSEI Concept

Social economy clusters or *Clusters of Social and Ecological innovation (CSEI)* are “Groups of social economy enterprises and other related supporting and economic actors that cooperate in a particular location to increase their joint social and ecologic impact by enhancing their cooperation, pooling resources and innovation capacity” (European Cluster Collaboration Platform).

CSEI represents an innovative model of collaboration that benefits various groups of stakeholders, for instance: public administration, social entrepreneurs, and academic institutions. Below, we outline how each of these groups can benefit from participating in CSEI.

## Benefits for the Public Administration

### Local and regional development:

Collaboration with CSEI enables local authorities and decision-makers to support sustainable social and ecological development. These initiatives focus on addressing local issues through social innovations, contributing to the improvement of residents' quality of life.

### Increased efficiency of public actions:

Participation in clusters allows for more efficient use of public resources through collaboration with the private and social sectors. Clusters act as platforms for exchanging knowledge and resources, accelerating the implementation of local development strategies.

### Securing funding:

CSEI clusters can assist in obtaining funds from various sources, including EU programmes, supporting the long-term financial stability of local projects. Public support for clusters also increases the chances of securing external funding.

## Benefits for Social Entrepreneurs

### Support and development:

Clusters offer social entrepreneurs access to a wide range of services, including business incubation, microfinance options, networking opportunities, and market development support. This enables social entrepreneurs to scale their operations and increase their social impact.

### Collaboration and innovation:

CSEI promote collaboration between different sectors, fostering innovation and the creation of new solutions for social and ecological challenges. Social entrepreneurs can benefit from the knowledge and resources of academic, public, and private partners, enhancing their competitiveness and ability to innovate.

### Community building:

Participation in clusters supports the building of strong local communities by engaging various stakeholders. Social entrepreneurs can establish valuable relationships that help achieve common goals and strengthen social solidarity.

## Benefits for Academic Institutions

### Research opportunities:

Universities participating in CSEI gain access to unique research opportunities arising from close collaboration with the social and public sectors. This enables the conduct of practical research with direct applications and impact on the local community.

### Knowledge transfer:

Clusters create platforms for knowledge transfer between universities and other sectors, promoting the practical application of academic theories. Collaboration with social entrepreneurs and public institutions provides students and researchers with valuable experiences.

### Community engagement:

Participation in CSEI increases universities' involvement in local social and ecological initiatives. Universities can play a leading role in promoting sustainable development and social innovations, positively impacting their image and reputation.

# General Success Factors on Clusters

## **Idea:**

In order to develop, the cluster must have a viable idea towards which the activity can be oriented.

## **Activities:**

There must be activities that create benefit and value from being part of the cluster.

## **Organisation:**

There is an organisation that coordinates and develops the cluster's activities and manages relationships necessary for its growth and development.

## **Driving forces and commitment:**

There is at least one passionate and committed member who constitutes the force of activity and change in the cluster. The cluster needs a champion!

## **Critical mass:**

A cluster consists of a group of members and among these there should be both a critical mass in number and a diversity for the cluster to function effectively.

**A cluster organisation, like a company, must have:**

...a business idea;  
 ...a function that drives and organizes the work;  
 ...a resource base of members;  
 ...and that there is something to offer them.

(Magnus Klofsten, researcher at Linköping University)

# A Spider Diagram Model of the CSEI Concept

For modeling the CSEI concept, a spider diagram was chosen. For the eight different dimensions (membership model, cross-sectoral composition, “ownership” and operational model, coordinating body, financial model, portfolio of services/activities, viable purpose/idea, collaboration among stakeholders), a region can review the current situation of each of the dimensions, ranking each from low/small/weak up to large/strong/high to visualise, which parts of the CSEI need more development.



# A | The Core Activities of a CSEI

## Establishing the Core Activities of a CSEI

The creation of a CSEI begins with developing a stable core that can coordinate both internal and external interactions with the wider ecosystem of structures and actors.

## Defining the Core Group for Creation

A fundamental early step is outlining a preliminary governance model: determining who is committed to the collaboration, how accountability will be practiced, and which decision-making structures are necessary. It is equally important to clarify the financial framework—whether funding is available for core activities and how that funding should be allocated to ensure it is used effectively by the actors involved.



## Building the Foundation: People and Culture

Once the governance and infrastructure of the cluster are in place, attention turns to the core functions that will nurture and sustain the ecosystem. A key element of this work is understanding the people and skills required. This includes identifying which competencies are essential for developing the overarching vision and specifying who needs to be connected to drive the initiative forward.

Because the cluster will involve a diverse array of organisations and individuals, establishing a shared culture early in the process is crucial. Setting clear principles, guidelines, and expectations for collaboration reduces uncertainty, aligns intentions, and creates a more coherent basis for collective action. Such cultural groundwork helps to minimise friction and ensures that participants understand how to work effectively within the ecosystem.

## Structuring the Core Functions

To ensure clarity and reduce overlapping responsibilities, the work of the core can be organised into four primary functions. These functions make it easier to navigate complexity and to ensure that the ecosystem receives support in all the areas necessary for long term sustainability.

### Strategy

The strategic function is essential because the cluster will interact with a wide spectrum of actors—ranging from grassroots initiatives to potential international partners. To manage this diversity, the core should include individuals with strong strategic capabilities and the experience needed to work across different systems. Their role is to provide direction, anticipate challenges, and guide the cluster through a constantly evolving landscape.

### Communications

Communication is a decisive success factor in ecosystem-oriented work. The core must be able to facilitate internal dialogue across the network while also building understanding among external stakeholders. This involves translating complex processes of co-creation and collaboration into messaging that is accessible, clear, and supportive of the cluster's goals. Without strong communication, misunderstandings grow, collaboration weakens, and progress becomes difficult to maintain.

### **Learning and Monitoring**

As clusters are still a relatively new form of organisational arrangement, the knowledge and skills needed for co creation and ecosystem collaboration may be limited among participants. For this reason, a strong emphasis on learning and monitoring is vital. This function focuses on building collaborative capacity, capturing insights, tracking progress, and documenting results and success stories. These results help members justify their involvement to their respective stakeholders—whether owners, funders, customers, members, or taxpayers—and strengthen the legitimacy of the cluster’s continued development.

### **Community Management**

Because a CSEI consists of many actors working together as an interconnected ecosystem, community management becomes a central component of the core work. This function requires individuals who are skilled at relationship building, coordination, process and project management, and event design. Their task is to maintain the social fabric of the ecosystem, support meaningful interactions, and ensure that activities unfold smoothly and thoughtfully. Effective community management keeps the ecosystem vibrant, connected, and capable of evolving over time.

## **Validating the cluster through a multi-dimensional analysis**

The next step in establishing the core is to conduct a thorough analysis of the ecosystem and its potential stakeholders. This includes identifying the types of activities present within the ecosystem and assessing the potential benefits of connecting these actors to a structure such as a CSEI. It is important to understand the value created by different stakeholders and the degree to which they are interconnected.

To function effectively as a supporting structure, a clear overview of relevant rules and regulations is required, particularly those related to the purpose and legal positioning of the CSEI. In addition, awareness of regional and national policies that align with and support the initiative is essential.

Knowledge of the funding landscape is also critical, both in terms of funding opportunities available to stakeholders and potential funding sources for the structure itself. This contributes to increased relevance for prospective members and supports the long-term sustainability of the cluster.

As the cluster is intended to be closely aligned with the context it serves, there is significant value in mapping cultural and social assets at an early stage. This includes identifying key actors with influence and understanding how the initiative connects to local cultural practices and traditions related to collaboration and development. The next steps of the guide will showcase a model for handling these dimensions.

## B | Dimensions of the CSEI Model

In the following chapters, the eight dimensions of the CSEI model (the spider diagram) are explained. After a paragraph describing the respective dimensions, examples follow and provide insights into practice. Each chapter is closed by recommendations for the target group on what to think about this dimension when put into practice.



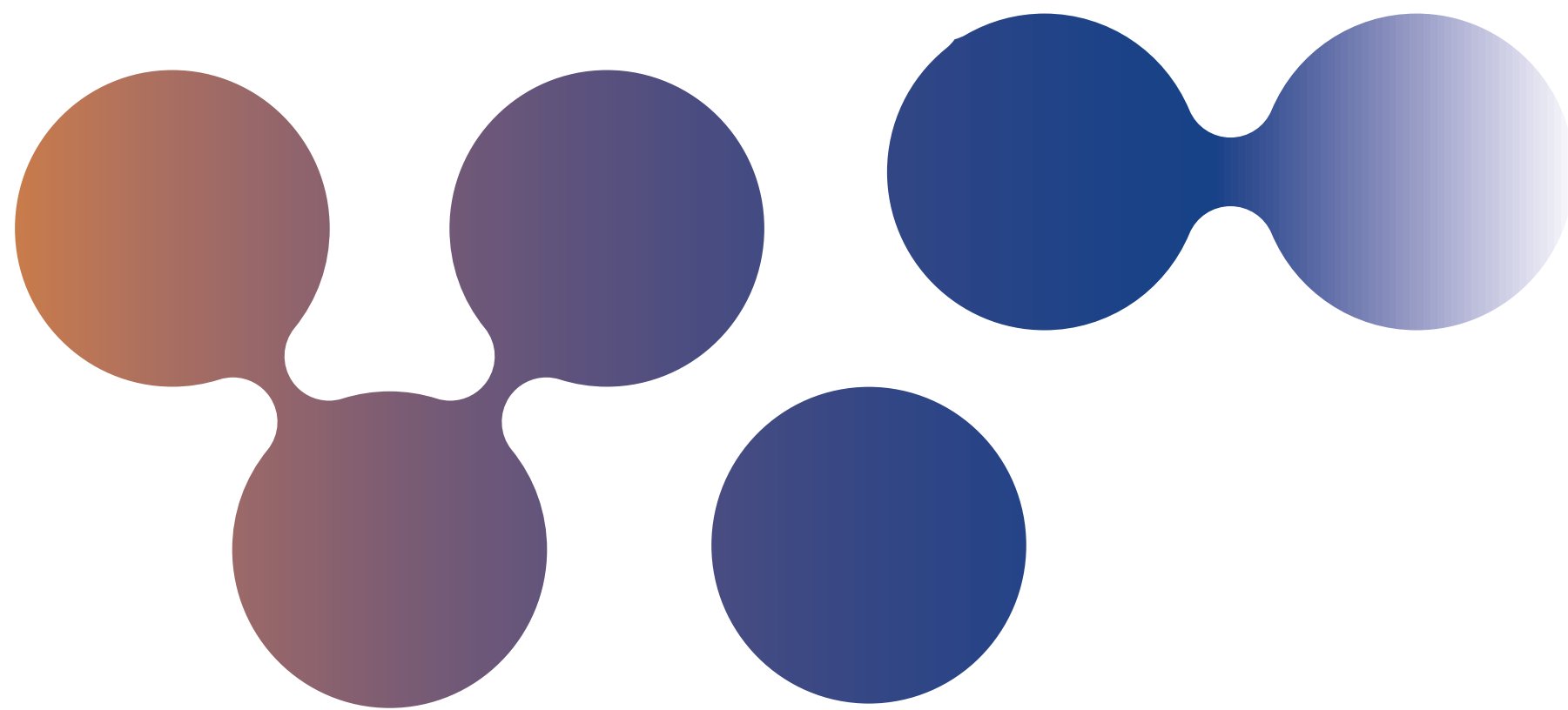
# I. Viable Purpose

A viable purpose refers to a multi-dimensional and sustainable mission that addresses both social and ecological challenges, often aligning with one or more of the Sustainable Development Goals (SDGs).

These viable purposes, based on cooperation, and often social and ecological innovation, will foster a social and solidarity-based economy, and a sustainable local economy firmly rooted in all territories and not just in the most competitive regions.

A viable purpose should serve as a guiding principle for individuals, organisations, or societies, providing direction and motivation. It should also be useful and aligned with the core values and mission of the individual or organisation. By considering feasibility, stakeholder feedback, and potential impact, one can ensure that a purpose is both meaningful and attainable.

In the context of CSEI's an ambition is to support social innovation and social enterprises generally as a tool for all sort of purposes.



## Different examples of viable purpose

There are different forms of viable purposes.

### **Regional transition:**

We want to drive socio-ecological transitions in our region through collaborative innovation and sustainable practices.

### **Social economy development:**

We want to promote the social economy sector by primarily working with advocacy, knowledge dissemination, and global monitoring.

### **Local economy development:**

We want to create a sustainable local economy firmly rooted in all territories of the Baltic Sea region, ensuring long-term resilience and prosperity for our communities.

### **Sustainable development:**

We want to promote economic growth that is environmentally sustainable and social inclusive.

### **Education for all:**

We want to ensure access to quality education for all individuals, regardless of their background or circumstances.

## What to think about?

When developing and implementing a purpose for a CSEI, it is crucial to consider various framework conditions that can significantly impact the feasibility and effectiveness of the initiative. These conditions include policies, regulations, funding and cultural contexts.

Here are some key elements to think about:

### **Policy Support and Alignment:**

- *Regional and National Policies:* Ensure alignment with existing regional and national policies that support social entrepreneurship, innovation, and sustainable development. This includes understanding and leveraging policy frameworks such as the EU's Green Deal, regional development strategies, and social economy policies.
- *Local Government Support:* Engage with local governments to gain support and alignment with municipal policies that can provide resources, infrastructure, and favorable conditions for CSEIs.

### **Economic Incentives and Funding:**

- *Access to Funding:* Identify funding sources such as grants, subsidies, and financial incentives from regional, national, and EU programmes dedicated to social innovation and sustainable development. Is the purpose well aligned with national and EU policies and therefore allows access to potential funding sources?
- Assess the investment climate for social enterprises and innovative projects, including availability of impact investors and philanthropic funding. Does the purpose address these stakeholders and their needs?

### **Social and Cultural Context:**

- *Language and Context:* Does the purpose fit into the social and cultural context of your region and will the vision be understood and attract stakeholders to join your cluster?

### **Co-Creation of Purpose:**

- *Create together:* A purpose that is co-created with the relevant stakeholders of your region will make them more likely to become part of your cluster.

Social economy clusters, and more specifically CSEI, are better viewed as “a resource for the territory” rather than “using the territory as a resource.” This perspective highlights their role in contributing to the social, economic, and environmental well-being of the local area.

## II. Cross-Sectoral Composition

A cross-sectoral composition refers to the diverse backgrounds of the initiators and owners of the cluster's organisation. We have chosen to define four sectors from which these individuals and entities originate:

### Public sector:

Government agencies, public institutions, and municipal bodies.

### Private sector:

Corporations, small and medium enterprises (SMEs), and private investors.

### Social economy and civil society:

Social enterprises, non-governmental organisations (NGOs), community groups, and non-profits.

### Academic and research institutions:

Universities, research centers, and think tanks.

A broad cross-sector collaboration favours the development of social and ecological innovation, and therefore we want to show, and encourage, different types of cross-sector collaboration.

As shown in the previous report from GECES (The expert group on social economy and social enterprises in EU) most of the already existing clusters in EU consist of mainly social economy actors, often in form of hybrid clusters with social economy and SMEs.

They suggest that the collectivist nature of clusters, and the cooperation between the organisations involved, may help explain why most clusters already have a collective structure from the very beginning of their formation

## Different examples of cross sectoral composition

- Actors in the cluster mainly come from the *social economy sector* (one sector)
- Actors in the cluster mainly come from *public and social economy organisations* (two sectors)
- Actors in the cluster mainly come from *private and social economy organisations* (two sectors)
- Actors in the cluster mainly come from the *social economy, public and academic sector* (three sectors)
- Actors in the cluster mainly come from the *social economy, private and public sector* (three sectors)
- Other types of cross sectoral compositions

## What to think about?

Involving the local municipality or authority in the cluster approach is highly desirable. Especially since you, together with the municipality, can adapt the cluster's purpose to the local context and existing strategies. It also ensures greater relevance among politicians and decision-makers and opens up opportunities for public financial support.

According to the GECES report on Clusters of Social and Ecological Innovation (CSEI), almost all clusters embody the multiple partnership approach, integrating at least two or three types of actors in their composition. These clusters are typically diverse in terms of sector of economic activity (NACE), indicating that their drivers often extend beyond merely enhancing local sectoral competitiveness. Instead, they are motivated by broader social and environmental objectives.

The vast majority of these clusters operate within specific political or administrative jurisdictions, emphasizing the importance of proximity.

This geographical confinement ensures that activities are tailored to the local context and needs, fostering stronger community ties and more effective interventions.

### III. Coordinating Body

In the previous chapter the guide describes the core functions of a CSEI. Usually, the clusters form from a coalition of committed people in an informal collaboration. This is why this guide describes the core functions in the former chapter. When formalising the coordinating body the functions could be the same but there's always a need to revisit the first commitment and see if there's need for rethinking the functions, according to the need of the stakeholders.

The coordinating body can be defined as a group of people responsible for managing and guiding the cluster's activities and initiatives, including the portfolio of services. Can be a legally established cluster

organisation with staff or an informally organized team, potentially relying on pro bono work.

This body is ensuring that the diverse stakeholders within the cluster work cohesively towards common goals.

It involves organizing and harmonizing the efforts of various participants, including social enterprises, public authorities, educational institutions, and private sector entities.

A main task is to develop and oversee the implementation of strategic and operative plans that align with the cluster's objectives, such as fostering social and ecological innovation.

## Different examples for the coordinating body

1. Hamburg Social Entrepreneurship Alliance (civic society entity):  
The Alliance is established as an association with office and employs 5 FTE.
2. Lithuanian Social Innovation Cluster (LSIC) (civic society entity)
3. *“Our Agder”* (public sector entity):  
The Agder County acts as secretariat and driving force of the regional cooperation structure.
4. Samforma (civic society entity):  
The main task is to promote the social economy and the civil society sector in the north of Sweden.

## What to think about?

When establishing a coordinating body, the portfolio of services influences the team’s required soft skills. A mutually signed constitution containing the CSEI’s mission might increase long-term commitment of the staff and/or board.

A legally established organisation can enhance reliability and trust among stakeholders, providing a stable foundation for operations. However, establishing a new organisation involves foundational costs, administrative efforts, and compliance with regulations, all of which must be budgeted for. Governance should reflect the cluster’s cross-sectoral nature, ensuring diverse representation in leadership.

Despite these challenges, legal autonomy allows the organisation to independently apply for and manage projects, increasing its impact. Choosing the right legal form, potentially with non-profit status, is crucial for accessing diverse funding sources and ensuring sustainability. Ultimately, a well-structured CSEI can effectively deliver services, secure funding, and maintain credibility within the social innovation ecosystem.



## IV. Operational Model

An operational model in the context of clusters of social and ecological innovation refers to the structure and methods by which these clusters operate to achieve their goals. This includes aspects such as leadership, governance, and the distribution of responsibilities and ownership.

Clusters can be led by public entities, private companies, academia, NGO's or a combination of sectors. Public leadership often involves local or regional governments, while private leadership might include social enterprises, non-profits, and private sector companies. In many successful clusters, there is a blend of both, leveraging public resources and private sector innovation.

The process of decision-finding and -making in a democratic and participative logic governance within these clusters is characterized by democratic and participative decision-making processes. This includes inclusive governance where interventions are managed collectively by entities representing different sectors. Such a setup ensures anchored and more effective decisions, promoting a harmonious social environment and sociocracy (inclusive and participative decision-making).

## Different examples of operational models

Examples of operational models in clusters of social and ecological innovation include:

### Public Clusters:

These aim to create societal wealth and jobs through reinforced networking of social economy organisations present in a specific area. They often have a formal structure and are supported by public policies and funding.

### Entrepreneurial Clusters:

These are similar to traditional industrial clusters but integrate social economy issues. They focus on increasing employability and integrating social innovation into their activities.

### Social Clusters:

These are formed by citizens to address local social needs, often in partnership with local authorities. Their primary goal is social innovation and community development.

However, this distinction is rather theoretical, in reality, social and entrepreneurial clusters might also fit the description of public clusters as in many regions clusters are cross sectoral by definition.

## What to think about?

Creating a successful operating model for a social and ecological cluster requires consideration of the purpose, members and local context of the cluster. Inclusivity and participation are fundamental, as an inclusive and participative governance structure ensures the rights and interests of all members, particularly the target groups, are respected.

Strong, positive, and democratic leadership is crucial for managing the cluster's complex dynamics effectively. Transparency and accountability in decision-making processes build trust and collaboration among members.

Clusters should aim for sustainable social impacts while maintaining flexibility to adapt to changing socio-economic conditions. This includes fostering innovative and culturally sensitive social intervention models.

## Key components of a CSEI operational model include...

### **Governance Structure:**

A clearly defined governance structure sets out the roles and responsibilities of the different actors within the cluster, including leadership, management, and advisory functions. It provides the basis for accountability, transparency, and effective decision-making. This aspect is closely linked to the existence of a legally established coordinating body that is able to act independently. If the cluster is organised merely as a project, it is usually embedded within a host organisation, whose own structures, interests, and priorities may influence the cluster's governance and strategic direction.

### **Stakeholder Engagement:**

Mechanisms for engaging and collaborating with a diverse range of stakeholders, including social enterprises, non-profit organisations, public authorities, private sector entities, and community groups. Effective stakeholder engagement fosters collaboration and resource sharing.

### **Decision-Making Processes:**

Transparent and inclusive decision-making processes that allow for the participation of all relevant stakeholders. This helps to ensure that the decisions made align with the collective goals and values of the cluster.

### **Monitoring and Evaluation:**

Systems for monitoring and evaluating the performance and impact of the cluster's activities. This involves setting measurable goals, tracking progress, and making adjustments as needed to improve outcomes.

### **Resource Management:**

Efficient management of financial, human, and material resources to support the cluster's activities. This includes securing funding from various sources, managing budgets, and ensuring the sustainable use of resources.

### **Communication and Coordination:**

Effective communication and coordination mechanisms to ensure that all stakeholders are informed and engaged. This includes regular meetings, updates, and the use of digital platforms for collaboration.

## V. Membership Model

Identifying the relevant actors within a social- and ecological cluster is crucial when the objective is to consolidate efforts towards shared goals. Membership plays a pivotal role in fostering predictability among these actors, thereby facilitating effective collaboration and coordination.

It's important to note that members do not necessarily have to be "social economy" actors. However, they should align with similar local societal or ecological missions. There is also the category of associated membership, where members are loosely connected participants in the cluster.

Organising membership in a cluster requires a thoughtful approach that considers the unique needs and capabilities of its actors, while also ensuring financial sustainability and alignment with the cluster's overarching goals. This balance is key to the CSEI's successful operation and impact.

### Different examples of membership models

Inspired by the Expert Group on Social Economy and Social Enterprises (GECES), membership in a cluster can be categorised into three fundamental types:

#### Closed and Formalised Membership:

This type is clear-cut, typically involving regular membership fees.

#### Open Membership:

This category includes various forms of membership. Some do not require regular payments, offering open membership. A variant of this type is based on cooperative traditions where members are also owners via shared stakes, as seen in Berziklatu and Modragon. An interesting example is Teple Misto (UA), where access to the cluster site is facilitated through a crowdfunding system.

#### Informal Membership:

This type does not involve recurring payments. Membership is determined based on delegation. Examples include The Partnership for Social Innovation in Örebro County (SE), Impact City The Hague (NL), and Grappe Construction Bruxelles (BE). These Clustered Social Economy and Innovation Initiatives (CSEI) tend to have strong ties with public authorities or a policy strategy.

## What to think about?

### **Membership criteria:**

Define clear criteria for membership and ensure that members share the cluster's vision and commitment to social and ecological innovation. Decide whether membership is open to individuals, organisations, or both. There may also be different membership categories, such as supporting members, full members, and honorary members. These categories may come with different rights and responsibilities, for example voting rights, access to services, or membership fee obligations.

### **Active participation:**

Participation is key to ensure energy, vitality, and progress in a cluster, active participation in meetings and events.

### **Inclusion and diversity:**

Ensure membership is accessible to a broad and inclusive group of people, avoid structures that might exclude less resourceful actors.

### **Inclusion and diversity:**

Clarify what is expected of members such as: contribute to the clusters development, adherence to the cluster's values and guidelines.

### **Digital and physical meeting spaces:**

Provide both digital and physical platforms for member interaction, build a digital infrastructure to enable remote collaboration, choose and design your physical space(s) so everyone feels welcome and included.



## VI. Portfolio of Services

A portfolio of services in the context of CSEIs refers to the diverse range of services provided by these clusters to support both their members and the communities they serve. The portfolio of services that the cluster chooses to offer its members, and the local community needs to be adapted to the local context and prevailing conditions.

The services to the community are designed to address economic, social, and environmental needs, thereby promoting sustainable development and social cohesion. The cluster also provides significant value to its members through a variety of means, which collectively enhance the individual and collective capabilities of the members.

## Different examples of portfolios of services

Clusters of social and ecological innovation offer various services tailored to their specific goals and the needs of their members. Examples include:

### **Economic Services:**

These services focus on economic development and job creation. They include business incubation, microfinance options, support for social enterprises, job creation initiatives, networking opportunities, and access to markets.

### **Social Services:**

Clusters often provide services aimed at social inclusion and community development. These can include educational programmes, health services, social integration initiatives, and support for vulnerable groups.

### **Environmental Services:**

Services under this category are designed to promote sustainability and ecological balance. Examples include waste management, green space maintenance, renewable energy projects, and initiatives for circular economy practices.

### **Technological Services:**

Many clusters offer technological support and innovation services, such as access to research and development facilities, technological training, and collaborative innovation projects.

### **Networking opportunities:**

The cluster can facilitate connections among members, leading to collaborative projects, partnerships, and joint ventures.

### **Knowledge and expertise:**

The cluster can arrange training sessions, workshops, and seminars to enhance skills and knowledge in specific areas.

### **Resources and support:**

The cluster can provide shared resources such as co-working spaces, venues and assist with securing funding through grants, loans or EU-funded projects.

### **Tailored business development:**

The cluster can provide personalized support for business planning, funding strategies, market analysis, and customer contacts. Encouragement and support for adopting social and ecological friendly practices.

### **Advocacy and influence:**

The cluster can mobilize stakeholders in policy-making processes, ensuring that the interest of the members is considered.

## What to think about?

**Target groups:** When developing a portfolio of services, it is crucial to consider the target groups that will benefit from these services. This includes identifying the specific needs of various community members, such as entrepreneurs, vulnerable populations, and local businesses, and tailoring services to meet these needs effectively

**Integration with Local Ecosystem:** Assess how the services fit within the local economic, social, and environmental ecosystem. This includes understanding the local context, identifying potential partners, and leveraging existing resources and infrastructures. Hence, instead of necessarily creating something new, you might build on what the existing support actors are offering and rather add what is still lacking.

**Regulatory and Policy Framework:** Analyze the regulatory and policy environment to ensure compliance and to identify opportunities for support

and collaboration with public authorities. This includes understanding local, regional, and national policies that can affect service delivery and cluster operations.

**Sustainability and Impact Measurement:** Implement mechanisms for measuring the impact of the services provided. This involves setting up a structure to track the outcomes and benefits of services, ensuring that they contribute to the cluster's goals of social, economic, and environmental sustainability.

**Strategy:** The strategy for providing services should be aligned with the overall goals of the cluster. This involves setting clear objectives, prioritizing services that have the most significant impact, and continuously evaluating and improving service delivery to ensure effectiveness and sustainability.

By focusing on these aspects, clusters of social and ecological innovation can develop a robust and effective portfolio of services that meet the needs of their members and contribute to broader societal goals.

## VII. Financial Model

In the GECES report “Clusters of Social and Ecological Innovation in the European Union, Perspectives and Experiences,” the concept of a financial model is critical to understand how clusters can be sustained and scaled. You need resources to operate, coordinate and administrate the cluster organisation. A financial model in this context refers to the strategies and mechanisms that clusters use to secure funding, manage financial resources, and ensure long-term sustainability.

Successful clusters often rely on a mix of funding sources, including public funding (e.g., grants from local, regional, or national governments), private investments, philanthropic contributions, and revenues generated from services or products offered by the cluster. This diversification helps mitigate the risk associated with dependence on a single funding stream.

## Different examples of financial models

- The members in the network pay a yearly fee which covers basic needs for the collaboration platform, that is run on a non-profit basis.
- The cluster organisation sells different services, e.g. arranging conferences and other events that generate income to the coordinating body.
- A public actor (municipality, region, state) provides funding to the coordination body. To be able to do that as a public authority it is helpful to have political legitimisation, e.g. a governmental strategy, in place.
- The cluster organisation, either alone or together with a local/regional public actor, seeks various forms of EU funding to address a specific societal challenge.
- Establishing partnerships with other organisations, including government agencies, private sector companies and non-profits that open up new funding opportunities and shared resources (or in-kind support).
- A community crowdfunding model, e.g. Open Collective, which gives organisations, communities, projects a legal status to raise funding through subscription or one-time payment.
- If the cluster is informally organised without any legal body, the cluster most probably either relies on non-financial resources like volunteering and pro-bono work or on bootstrapping.

## What to think about?

Clusters are encouraged to develop business models that include self-sustaining revenue streams. This could involve offering fee-based services and workshops or a membership model where members, for example, assist with resources based on how much they use a cluster's services. The goal is to reduce long-term dependency on external funding.

If the cluster relies mostly on project financing, it is necessary to have a stable organisation, a clear project strategy, and sufficient liquid funds. A financial model solely reliant on project funding is particularly vulnerable due to the risk of having to shut down the services when the project ends, and that doesn't create a continuity of competences, networks and partnerships which is so important when starting up a new cluster.

Therefore, it is highly desirable to anchor the ideas of a social and ecological cluster with a public financier. This anchoring provides a more secure financial foundation and reduces the risks associated with fluctuating project funding.



## VIII. Stakeholder Collaboration

Stakeholder collaboration in the context of a CSEI refers to collaboration with actors and organisations outside the cluster itself. This includes the broader community, organisations and networks in the wider field of social innovation, and stakeholders who may not be part of the direct ecosystem but still influence the cluster's development.

Strong stakeholder collaboration can create value in different ways. It can increase the visibility of the cluster in the region, support advocacy work towards municipalities and other public actors, help identify new topics and opportunities, attract new members, and open up access to funding, partnerships and strategic support. In this sense, stakeholder collaboration is an important development dimension of a CSEI, as it strengthens the cluster's relevance, reach and anchoring in the wider regional ecosystem.

## Different examples of collaboration among stakeholders

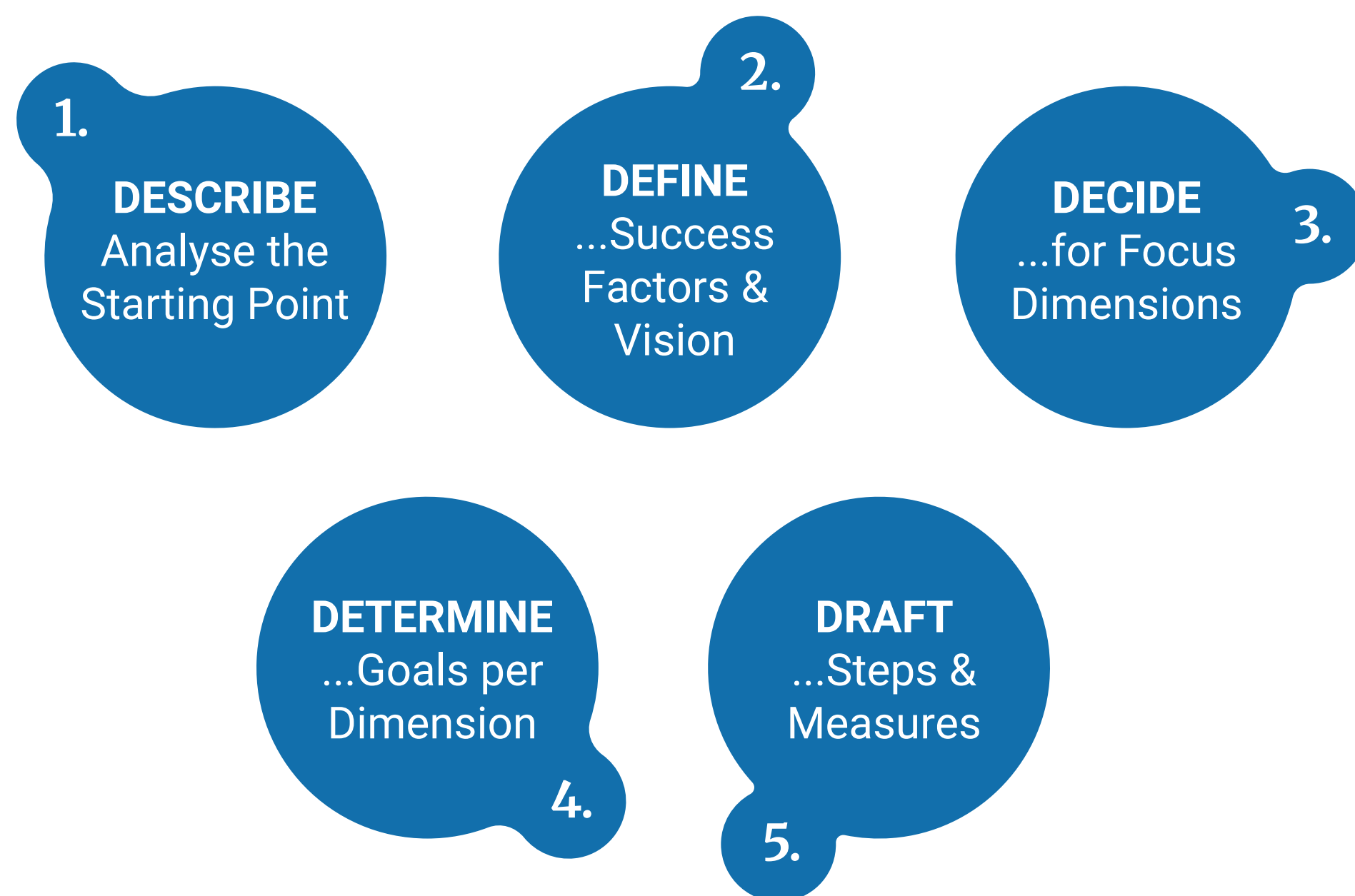
There are different forms of collaboration:

- Community collaboration: Reaching out to the community is perhaps the most common type of stakeholder collaboration. It involves community engagement or public participation, for example through open events, workshops, consultations or communication activities. This helps the cluster stay connected to local needs, ideas and societal developments.
- Partnerships: This refers to longer-term collaboration with stakeholders outside the cluster. These may include other organisations, community groups, non-profits, universities, government actors or support organisations. Such partnerships can support joint activities, policy development, advocacy, exchange of knowledge and access to new resources.
- External collaboration: This can take place in a more informal way or on a project basis. It may involve conventional innovation support actors, investors and funders, vendors and suppliers, freelance contractors, clients and customers, or other organisations with relevant touchpoints to the cluster. Even if these actors are not part of the core ecosystem, they can still play an important role for the development and sustainability of the cluster.

## What to think about?

- Relevant stakeholders: Identify which stakeholders outside the cluster are most relevant for your development. Which types of stakeholders are important in your regional context? Who is necessary to create positive outcomes for the cluster and the region?
- Stakeholder interests and influence: Learn about the priorities, needs and concerns of each stakeholder group. It is also useful to sort stakeholders according to whether they foster, are neutral towards, or block your activities.
- Purpose of collaboration: Reflect on why you want to engage certain stakeholders. Is it about regional visibility, financing, policy development, advocacy, staying close to societal realities, gaining access to knowledge, identifying new topics, or gaining new members?
- Communication channels: Consider which communication channels are most suitable for reaching relevant stakeholders. This may include newsletters, social media, bilateral exchange, events or formal consultation formats.
- Networks and events: Think about which networks, meetings and public events are important for the cluster to be present in. Visibility in the right places can strengthen legitimacy, help build relationships and increase opportunities for collaboration.
- Inclusion and incentives: Reflect on how stakeholders can be included, even if they are not members of the cluster. Are there visible, low-threshold entry points and ways to engage? Are there incentives for them to join, contribute or stay connected over time? A cluster can benefit from being open enough to attract new impulses, while also being clear about its identity and focus.
- Quality and strategic value of relationships: Reflect on how stakeholder relationships contribute to the cluster's development, strengthen its position in the ecosystem and support its social and ecological ambitions. How does stakeholder collaboration help the CSEI build relevance, trust and long-term capacity?

# C | The Process: How to Approach the Establishment of a CSEI



## How to create or evaluate a CSEI using the 5-step process

This process works both as...

...a creation method (building a CSEI cluster from scratch based on the previously described core and existing resources) and as

...an evaluation method (checking maturity, gaps, and next development priorities).

The logic is simple: start with the status quo, define a shared picture of success, prioritize what is most essential or obvious, translate priorities into measurable goals, and then design an action plan that is concrete enough to implement.

# 1 | DESCRIBE the Starting Point of your CSEI

## → analysis of baseline and preconditions

Begin with a structured inventory of the status quo, thus the CSEI foundation in your region. The goal is not to judge quality yet, but to establish a common understanding of the starting point: what resources, capabilities, and conditions are already present – internally and externally.

### Internal resources to analyse

- *People & skills*: Which expertise and capacity do we have at hand?
- *Financial base*: Is the financing for the initiative secured or which financial resources or funding streams can we utilize?
- *Established governance practices*: Do we have already established decision-making routines, accountability, roles and coordination mechanisms?
- *Organisational culture*: On which cultural foundation do we build the CSEI? Think about terms like trust, collaboration norms, openness to learning, conflict handling, experimentation.
- *Infrastructure*: Which physical spaces, digital tools, data access and administrative capacity can you rely on?

### External resources to collect

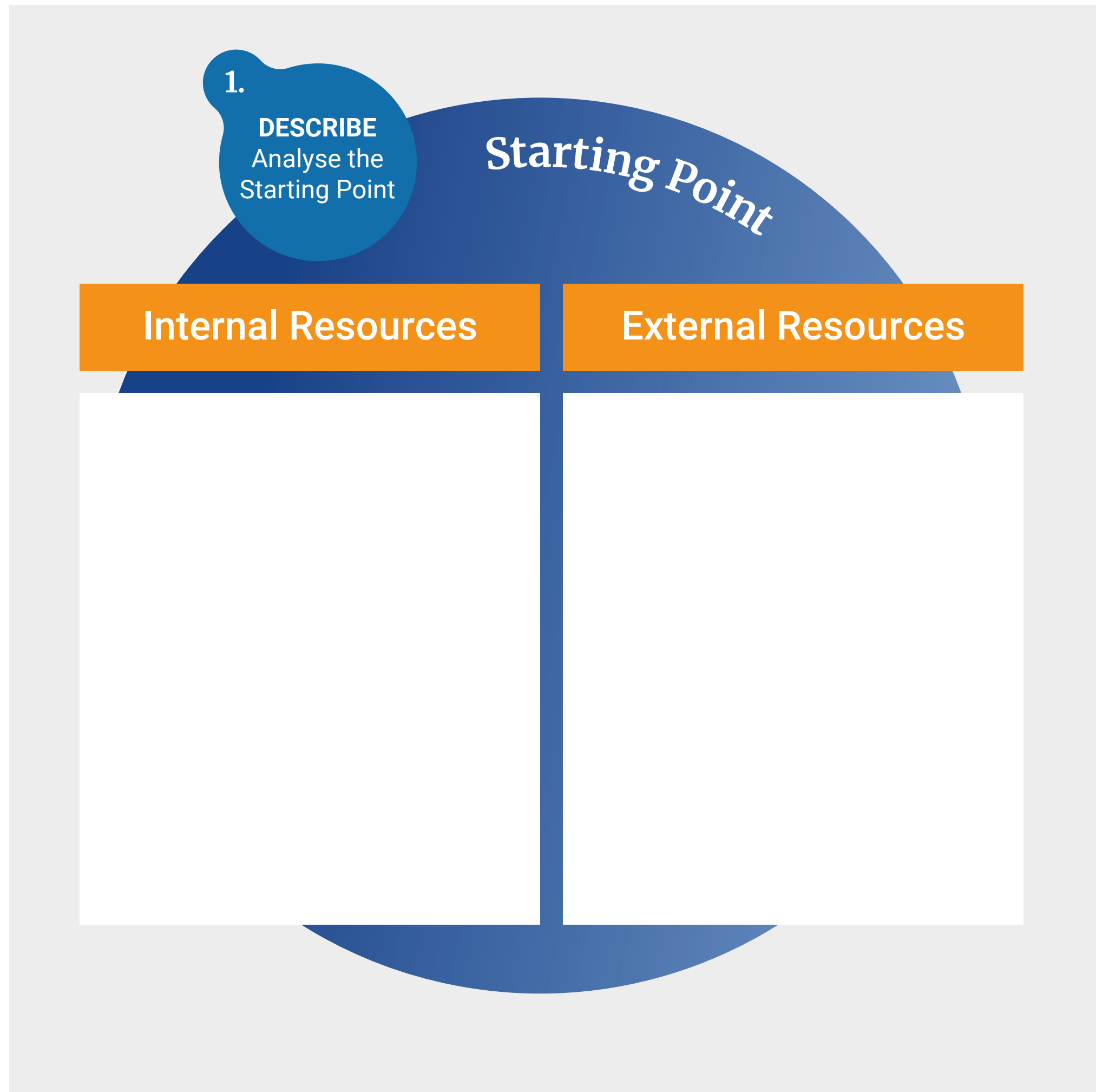
- *Ecosystem activities*: Which relevant existing initiatives, collaborations, events, projects, networks or intermediaries are already established in your region?
- *Market connections*: Are you aware of any potential partnerships with companies, procurement opportunities, or signs of demand from the market?

- *Policy & regulation*: Which enabling or limiting frameworks, public priorities, compliance constraints or potential incentives should be taken into account?
- *Funding landscape*: Do you have access to any relevant funders, public programmes, philanthropic sources or investment actors and knowledge of specific eligibility criteria?
- *Stakeholder networks*: Who are the key actors across sectors and connectors to consider? Are there any power dynamics or trust relationships that you need to take into account?
- *Cultural & social assets*: What are the outlines of your region's local identity, social capital, community engagement, civic participation, legitimacy?

### Output of Step 1

A clear baseline that can be used for evaluation: “This is what we currently have and what we can build on.”

Your status quo analysis can be captured as a short profile, a resource map, and/or an initial rating per spider-diagram dimension.



Template 1: Frame for collecting internal and external resources in step 1 DESCRIBE



Template 2: Orientation sheet for analysing the starting point in Step 1 DESCRIBE

## 2 | DEFINE Success Factors & Vision

→ shared target picture

Next, articulate what the CSEI should ideally become in your region. This step creates alignment: without a shared vision, later decisions tend to be scattered or driven by the loudest stakeholders.

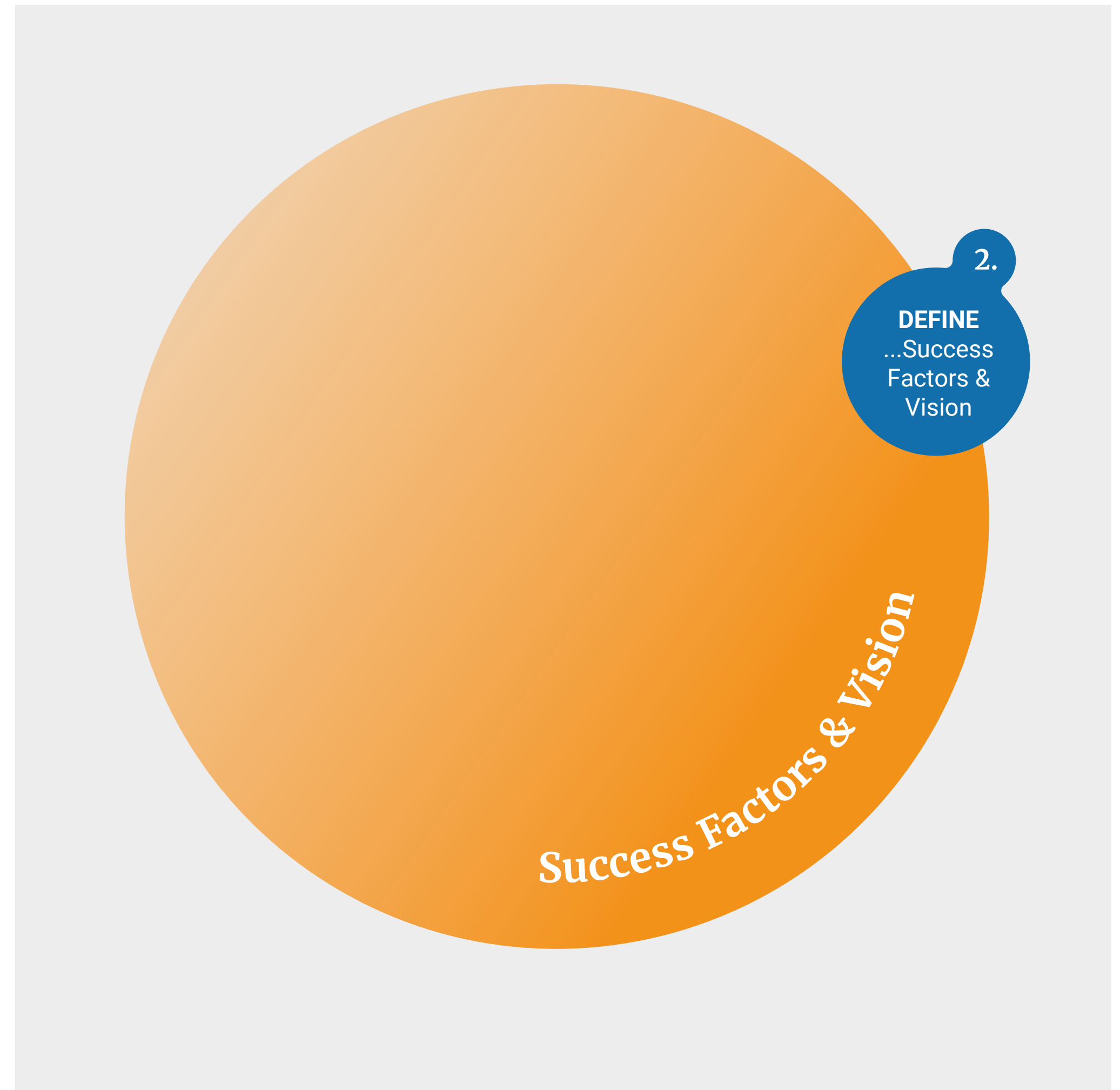
### Key questions to guide the vision:

- What is the purpose of the CSEI cluster here, i.e. what problem(s) does it help solve?
- What would “high performance” look like in practice (not just in slogans)?
- How would people in the region experience the CSEI: as a platform, a network, a support structure, a service?
- What are the non-negotiable success factors (e.g., legitimacy, governance quality, financial resilience, inclusion)?

You can either define an overall meta-vision or use the spider diagram dimensions (“spider legs”) to make the vision tangible. For each area, describe what “good” looks like in your context. This provides a common language and avoids abstract visions that are hard to operationalize.

### Output of Step 2

A concise vision statement in a few sentences plus success factors, optionally translated into an “ideal spider profile” that describes the desired maturity level across dimensions.



Template 3: Frame for noting down success factors and a vision statement in Step 2 DEFINE

### 3 | DECIDE for Focus Dimensions

→ priorities for reaching success

With status quo (Step 1) and vision (Step 2) on the table, identify the gap: what is missing or underdeveloped and what is most critical to address first. This is where you make trade-offs deliberately. Since resources are limited, the aim is to avoid trying to improve everything at once.

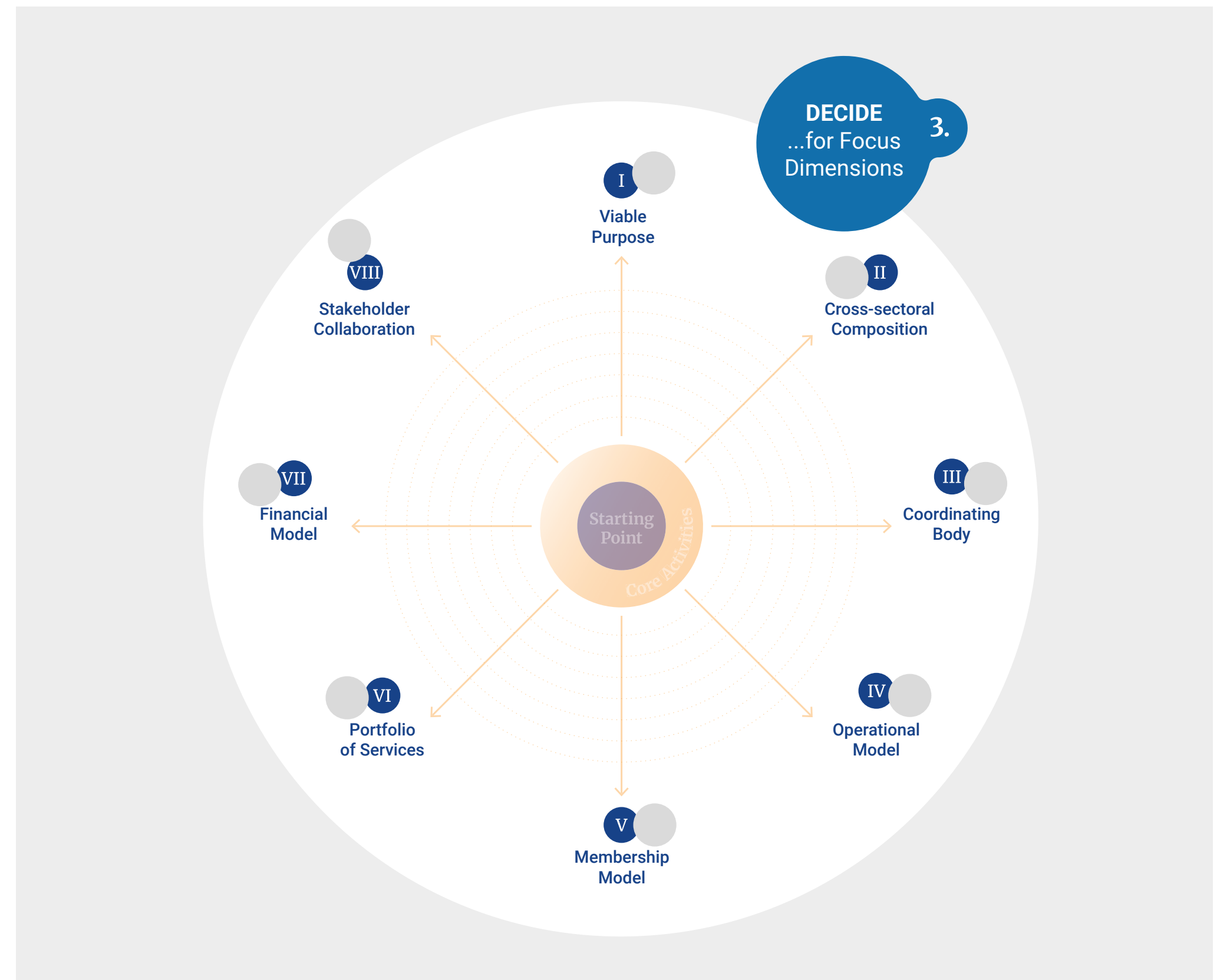
#### How to select focus areas well:

- Compare baseline vs. vision across the spider legs: where are the largest gaps?
- Look for bottlenecks: areas that block progress everywhere else (often governance, funding, coordination capacity).
- Look for leverage points: areas where improvement will unlock multiple outcomes (e.g., a strong stakeholder network might accelerate funding access and pilot partnerships).
- Consider feasibility: what can realistically be improved within your time horizon and resource constraints?
- Define a timeframe and choose approximately three focus dimensions to prioritize initially. This keeps attention and energy concentrated and makes progress visible.

Optional: If it helps you with your decision-making and prioritization, you can already set a time frame for a second phase in which you will address the dimensions with the second priority level.

#### Output of Step 3

A short list of priority focus dimensions or a corresponding indication in the diagram, including a brief rationale for why these were chosen now.



Template 4: Frame for marking prioritised focus dimensions in Step 3 DECIDE

## 4 | DETERMINE Goals per Focus Dimension

→ clear targets

For each focus area, define one goal that translates your vision into a measurable target. This is the bridge between strategy and action: it turns “we want a strong ecosystem” into “we will achieve X by Y.”

### Use SMART goals:

- *Specific*: clear about what will exist or change.
- *Measurable*: includes indicators or evidence.
- *Achievable*: realistic given capacity.
- *Relevant*: linked to the vision/success factors.
- *Time-bound*: includes a timeline.

### Good goals often include both:

- an outcome component (what improves in the ecosystem), and
- a capacity component (what the CSEI can reliably do).

### Output of Step 4

Three goals (one per focus dimension), each written as a SMART statement with simple indicators.

Prioritized Dimensions:

Goal(s):

Goal(s):

Goal(s):

Goal(s):

**DETERMINE**  
...Goals per Dimension  
4.

Template 5: Frame for setting goals per focus dimension in Step 4 DETERMINE

## 5) DRAFT Steps & Measures

→ implementation plan per goal

Finally, design the action plan: what concrete steps will move each focus area from status quo toward the goal?

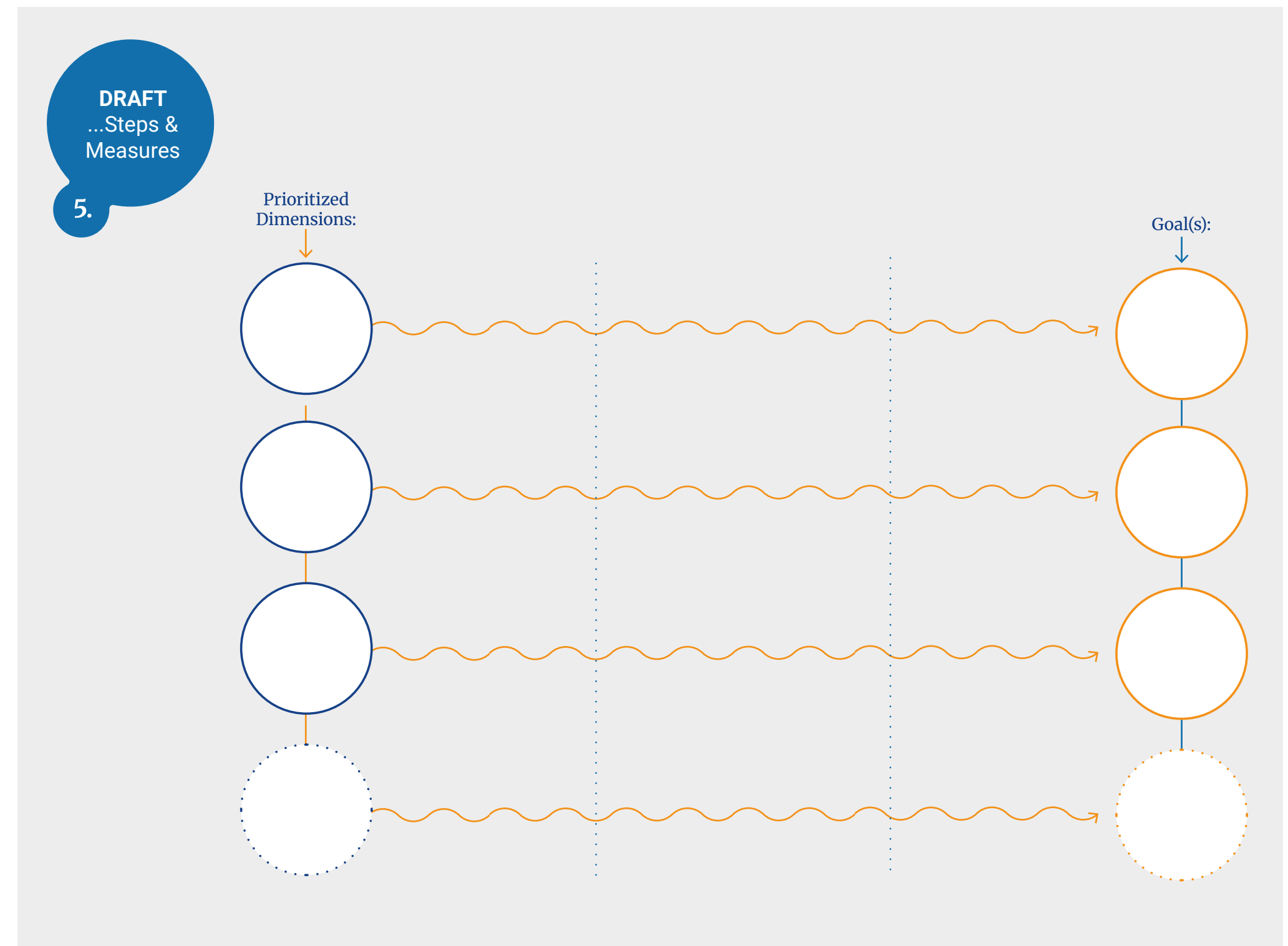
**This is where you make the plan operational:**

- Identify measures (activities, interventions, structures, pilots, partnerships).
- Define owners (who is responsible) and contributors.
- Define milestones (what progress looks like at 30/60/90 days or quarterly).
- Clarify resources needed (time, funding, tools, political support, expertise).
- Include a simple monitoring routine (how you'll track progress and adjust).

To keep it implementable, formulate steps at a practical level (not just “build capacity,” but “run 3 partner roundtables,” “set up governance charter,” “pilot 2 use cases,” “create funding pipeline,” etc.).

### Output of Step 5

A lightweight roadmap per focus area: measures, owners, milestones, and tracking approach.



Template 6: Frame for planning the implementation in Step 5 DRAFT

# Using the Steps beyond Creation: Evaluating (Potential) CSEI

If you're evaluating an existing CSEI, the steps remain the same, but the intent shifts depending on whether there are already defined priorities, goals and measure or whether you want to use the five steps to enter a new phase of development for the cluster:

## **Step 1...**

...becomes a maturity snapshot (strengths, gaps, constraints).

## **Step 2...**

...tests whether there is a shared and current vision  
(or whether stakeholders have drifted).

## **Step 3 either...**

...surfaces whether priorities are well-chosen (or too broad / not aligned with bottlenecks), or...  
...defines the priorities for the cluster's upcoming development phase.

## **Step 4 either...**

...checks whether goals are measurable and meaningful  
(or vague / untrackable), or...  
...sets new goals.

## **Step 5 either...**

...reviews whether measures are concrete, resourced, and owned  
(or "nice ideas" without delivery structures), or...  
...outlines measures to reach the goals.

# D | Examples of Existing CSEI Clusters

## I. National Audit Union of Social Cooperatives (Poland)

**Name:** National Audit Union of Social Cooperatives (Ogólnopolski Związek Rewizyjny Spółdzielni Socjalnych - OZRSS)

**Location:** Warsaw, Poland

**The formation date:** 2007

**Membership size:** OZRSS represents and supports approximately 421 social cooperatives from across Poland, providing a platform for their development and advocacy. The organisation is dedicated to social cooperatives and is also authorized to conduct the legally required audits for this type of enterprise.

**Cross-sectoral composition:** The Union collaborates across various sectors, including public, private, and non-governmental organisations, aiming to foster integration and strengthen cooperation among these diverse groups.

**Operational model:** OZRSS is governed by the Union's Council, elected by the General Assembly of Members. The Council directs the activities of OZRSS and makes strategic decisions regarding its operations.

**Financial model:** The Union is funded through membership fees, grants, and projects carried out in collaboration with national and international partners. This financial model supports its statutory activities, such as advisory services, training, and audit reviews.

**Portfolio of services:** OZRSS offers a wide range of services, including advisory and training support for social cooperatives, audit reviews, assistance in fundraising, and representation of members' interests at the national and European levels.

## Cluster Story:

### National Audit Union of Social Cooperatives

**Viable purpose:** The Union's primary goal is to support the development of social cooperatives in Poland and to promote social economy as an effective tool in combating social exclusion and unemployment. It seeks to strengthen social cooperatives by enhancing their efficiency and ensuring stable operating conditions.

**Collaboration among stakeholders:** OZRSS actively collaborates with a variety of partners, including public administration, NGOs, financial institutions, and the academic community. This collaboration is aimed at promoting the social cooperative model and jointly developing innovative solutions in the field of social economy.

#### Which were the success factors when establishing the network?

The success of establishing the National Audit Union of Social Cooperatives (OZRSS) can be attributed to a few key factors. First, the Union emerged as a response to the growing need for a unified representation of social cooperatives across Poland. This need was especially pressing due to the rapid development of the social cooperative sector, which required a strong advocacy body to support its interests. Additionally, the Union's early commitment to providing essential services, such as advisory support, training, and audit reviews, played a crucial role in gaining trust and building a solid membership base. The collaborative approach, engaging various stakeholders including cooperatives, public institutions, and NGOs, also contributed to the Union's successful foundation.

#### Which learnings did you take away from the starting period?

One significant lesson from the early stages of OZRSS's development was the importance of clear communication and alignment among stakeholders. The Union initially faced challenges in unifying diverse social cooperatives, each with its own unique needs and expectations.

Balancing these differences while maintaining a cohesive organisational mission required patience and adaptability. Moreover, the Union learned the value of focusing efforts on engaged and committed stakeholders rather than trying to convert skeptics, which could drain resources and affect team morale.

### **What development do you see in the near future?**

The future of development is closely tied to the SAMO-ES project. The project “SAMO-ES. Self-organisation of Social Enterprises as a Response to Social Challenges” is being implemented through a partnership of four key organisations. This partnership is led by the National Audit Union of Social Cooperatives (OZRSS) and includes the Foundation for the Development of Social Entrepreneurship “Być Razem” from Cieszyn, the Association for Social Cooperatives, and the Klon/Jawor Association. These organisations have joined forces to leverage their combined expertise in social economy, working together to empower social enterprises, strengthen their identity, and enhance their potential in addressing social challenges.

Over the next few years, OZRSS and its partners will work closely with social enterprises to build a national network that will serve as the precursor to this new organisation. While OZRSS has traditionally focused on supporting social cooperatives, this new organisation will extend its support beyond just

one specific form of social enterprise, embracing a wider range of social enterprises across Poland. Initially, this network will be informal, but by the spring of 2026, the goal is to formally establish it as a member-based, self-help organisation with at least 200 members.

As part of its long-term vision, the organisation also plans to create a dedicated fund that will foster the growth and development of social enterprises. This fund will serve as a financial tool to empower social enterprises, providing them with the resources necessary for sustainable growth and greater impact.

Through this initiative, OZRSS, alongside its partners, is committed to playing a central role in shaping the future of social enterprises in Poland, empowering them to address social challenges more effectively and sustainably. The project, funded by the European Social Fund Plus (ESF+) 2021-2027, aims to create lasting social change that will support the growth and significance of social entrepreneurship in Poland.

**More information:** [OZRSS website](#) and [SAMO-ES website](#)

## II. Hamburg Alliance for Social Entrepreneurship (Germany)

**Name:** Hamburg Alliance for Social Entrepreneurship

**Location:** Hamburg, Germany

**The formation date:** 2023

**Membership size:** about 170 (March 2026)

**Cross sectoral composition:** social enterprises, universities, public administration, welfare organisations, foundations, support organisations

**Operational (coordinating) body:** association with about 5,25 FTE, initiated by the senate of Hamburg, 7 founding organisations, one board member for each sector

**Financial model:** 100 % publicly funded by the Free and Hanseatic City of Hamburg

**Portfolio of services:** consulting, knowledge transfer, visibility, networking, initiating impact partnerships

**Viable purpose:** implementing Hamburg's Social Entrepreneurship strategy with its purpose to establish and strengthen Social Enterprises as a "driving force for a liveable city for everyone"

**Collaboration among stakeholders:** good, but expandable

## Cluster Story: Hamburg Alliance for Social Entrepreneurship

### Which were the success factors when establishing the network?

On the state level, SEND (social entrepreneurship network Germany) e.V.'s strong advocacy and lobbying efforts have led to the inclusion of „Social Entrepreneurship“ in Hamburg's coalition agreement 2020. In Hamburg, the exceptional cross-sectoral collaboration throughout the strategy process has been instrumental, creating a „coalition of the willing“ that is driving significant progress in establishing SI/SE in urban society.

### Which learnings did you take away from the starting period?

Too much time was spent trying to convince some existing ecosystem players or stakeholders whose skepticism prevailed from the beginning and who unfortunately could not yet be convinced to support the topic. Important time resources were used for this which were lacking elsewhere. Beside this, it affected the team's morale, as rejection came from these important stakeholders.

### What development do you see in the near future?

In the near future, the Hamburg Alliance for Social Entrepreneurship will see an increase in memberships, hopefully with more “traditional” innovation support actors joining or supporting the Alliance. The goal is to reach long-term financial stability and to be recognized as a valuable organisation amongst the innovation support community in Hamburg. The visibility of social innovation/social entrepreneurship will increase in the near future due to the work of the Hamburg Alliance.

### More information: [Social Entrepreneurship Hamburg](#)

# E | Key Learnings from Practice

CSEIs emerge in highly complex and context-specific environments. For this reason, they cannot be developed through a universal blueprint that works in the same way across all regions. However, regions can benefit from a structured process that helps them analyse their starting point, reflect on relevant dimensions, set priorities, and translate these priorities into concrete next steps.

This guide therefore does not prescribe one fixed model for establishing a CSEI. Instead, it offers eight dimensions that regions can use to understand, design, or evaluate their own cluster approach. Each dimension includes an explanation, examples, and practical considerations that help regions reflect on what is most relevant in their specific context.

The piloting in RESIST generated valuable insights into how regions can use this model in practice and what matters when building and sustaining clusters for social and ecological innovation. One of the most important lessons is the need for early and sustained communication.

One region advises:

**“Start very early with informing and inspiring before the actual physical meetings take place.”**

Another emphasizes the organic nature of cluster development:

**“Clusters cannot be artificially created by external forces [...] they must occur organically, driven by genuine collaboration.”**

Regions also learn that stakeholder engagement improves when contributions are visualised and acknowledged. Flexible formats such as combining workshops with one-on-one talks and using visual tools are found to be effective. International exchange is another key driver of learning, with regions reporting that exposure to other models helps accelerate local understanding and capacity.

One region summarizes:

**“Stakeholder ownership is built step by step through open, inclusive processes. Be flexible with formats – mix workshops with 1:1 talks and visuals. Document every step transparently – even informal feedback has long-term value.”**

These lessons show that CSEI development is both structured and emergent: while regions can follow a clear process of analysis, prioritisation, and planning, the actual cluster must grow through relationships, shared ownership, and adaptation to the local ecosystem.

In the conducted interviews with the regions another valuable insight was that the CSEI model function as a navigation system, helping the piloting partners analysing the regional ecosystems and carrying out conversations about the possibilities to build a cluster.

There are two main challenges partners face in these conversations.

- The region has many different actors and collaborations. So to create a CSEI they need deep understanding of the ecosystem and build relationships throughout it.
- There is a lack of experience and knowledge about social innovation and the benefits of it. The partners need to put a lot of effort into the conversations regarding social innovation, opposed to focusing on the creation of a CSEI.

To tackle the first challenge the guide can be seen as a tool for conversations and a blueprint for an ideal CSEI. Helping the user to know what to look for within the existing ecosystem, to be able to build on the strengths identified in the system from the guide. The guide helps to know what to look for and why this is important for supporting social innovation.

This guide helps to tackle the second challenge through the possibility to raise awareness and knowledge on the benefits of strong support structures for social innovation. The guide is followed by other materials in the Resist project such as the Mission Orientated Innovation Process and What is Social Innovation, that serves as a collection of materials that provides the insights needed. This has been the case for some of the Resist piloting regions, where the project team needed to make the case for social innovation.

# Imprint

## Practical Guide: How to set up a CSEI, May 2026

**RESIST** – Regional Ecosystems for Social Innovation and Social Transformation

**Website:** [interreg-baltic.eu/project/resist/](https://interreg-baltic.eu/project/resist/)

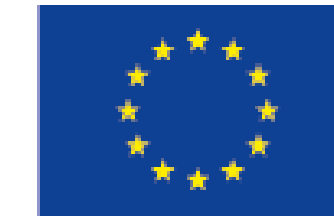
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