Social Innovation + Initiative

European Competence Centre for Social Innovation:
ESF+ Community of Practice on Social Innovation and
National Competence Centres Working Group

‘Collaboration and Funding Strategies for the National Competence Centres’ Workshop

Summary report

27 June 2025, Online

Funded by the European Union

Prepared by*:* Armelle Ledan, Gorka Espiau, Eglė Butkevičienė, John Healy in collaboration with the Community of Practice on Social Innovation team.

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1. Background information

1.1. Objectives

The online event was a joint session of the Community of Practice on Social Innovation (SI CoP) and the National Competence Centres Working Group (NCC WG) under SI CoP, exploring complementary approaches and exchanges:

a. Funding roadmaps for the National Competence Centres (NCCs);
b. The nature, obstacles and enablers of collaboration between ESF+ Managing Authorities (MAs) and NCCs to support Social Innovation (SI).

This event aimed to enhance NCC collaboration and funding strategies. Established in response to the 2020 and 2022 EU NCC calls, these centres are designed to provide the funding, professional support capacities, coherence, synergies, learning, and cooperation opportunities that are often lacking in order to sustain social innovation consistently. Maintaining and developing their functions and activities is therefore essential for reinforcing the SI ecosystem and making more effective use of the ESF+ to foster social innovation. Participants benefited from practical examples of different NCCs sharing their funding roadmaps, lessons learned, and collaboration with ESF+ MAs. These presentations were supplemented by more in-depth discussions during breakout sessions.

1.2. Target group

The event was open to all SI CoP members, with a strong focus on representatives from MAs and NCCs.

1.3. Number of participants

A total of 155 participants registered, of whom 94 attended.

1.4. Geographical and typology spread

- 25 Member States (MS).
- ESF+ MA (national and regional): 24%, NCCs: 20%; IBs and Line Ministries: 20%; EC: 16%; NGOs: 6%.

2. Main findings

2.1. Key outcomes

During the first part of the event, participants learnt about specific examples of how NCCs for SI are designing and implementing their funding and collaboration strategies. Representatives from different NCCs, Filipe Almeida (Portugal), Zofia Komorowska and Kuba Wygnaski (Poland), and Berta Gonzalez (Spain), shared their funding roadmaps and the lessons they have learned so far. Additionally, participants had the opportunity to discuss their own funding strategies in breakout sessions facilitated by the NCC WG Thematic Experts.

The most significant findings were related to a 'demand-oriented strategy'. Rather than implementing a traditional funding mechanism for 'single point solutions', participants highlighted the opportunity to collaboratively identify complex societal challenges and then request the most appropriate combination of a demand-driven funding.

During the second part of the event, an analysis of the survey covering collaboration between NCCs and ESF+ MAs was shared. The survey was completed by 13 ESF+ MAs from 11 MS and 15 NCCs from 13 MS (Austria, Belgium, Croatia, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Poland, Luxembourg, Romania, Sweden, Spain). Despite some differences between NCCs and ESF+ MAs, the overall diagnosis of their collaboration is the same regarding both barriers and enablers to collaboration. Participants then heard about two examples of successful collaboration presented during a dialogue between Barbara Willsberger (NCC Austria) and Anna Tengqvist (NCC Sweden), allowing for a comparison of the two contexts. They provided concrete examples of functions and activities developed to support the ESF+ MAs and the overall implementation of SI priorities. These exchanges and the presentation of the survey results formed the basis for more in-depth discussions between participants during breakout sessions.

With regard to collaboration between ESF+ MAs and NCCs, the following was agreed:

- **Common recognition of the main obstacles:** the **low political priority** given to social innovation and the lack of a clear political mandate and strategic integration into national funding frameworks negatively impact the visibility and support of social innovation and, therefore, collaboration between ESF+ MAs and NCCs. The cross-cutting nature of social innovation does not align with **siloed administrative structures,** and coordination across departments/ministries is difficult. **Complex and unclear governance structures, combined with ESF+ rules that are often inappropriate to SI and overregulation,** constitute obstacles to effective collaboration between these key social innovation actors.

Many NCCs highlighted the **lack of resources within ESF+ MAs** as a powerful barrier to cooperation and stressed their lack of understanding of social innovation.

- **Factors enabling effective cooperation: Direct ESF+ funding** of NCCs promotes stronger long-term cooperation (e.g. Poland, Sweden and Austria). An **institutional alignment** between ESF+ MAs and NCCs can also simplify cooperation (e.g. same ministry or cooperation/partnership agreement, as in Czechia, Slovakia, Spain or Denmark), although it can also work effectively with independent entities (e.g. Sweden and Austria). The **human dimension** of cooperation was strongly emphasised as a necessity on both sides (e.g. trust, personal commitment, openness, and continuity of staff; regular contact, mutual respect, and shared problem solving). Ultimately, **regular communication, joint planning, and, most importantly, joint activities** support a shared vision and practical collaboration. The ESF NCC calls were often seen as a catalyst for starting cooperation. EU-level exchanges through the SI CoP also provide opportunities to gain inspiration from abroad and strengthen domestic collaboration.
- The functions are complementary and can be summarised as follows:
- **NCCs** provide social innovation expertise, tools, and networks, as well as practical capacity-building initiatives (e.g. training and SI masterclasses) for ESF+ MAs.
- **MAs** contribute administrative skills, access to EU funding mechanisms, and possible funding.

2.2. Participant feedback during the event

With regard to financing strategies, participants highlighted the differences that exist within each NCC. A single model is not possible because each country has a different type of engagement with local institutions (ESF+). While the common elements (the roadmap) can be developed in similar terms, this depends on whether funding comes exclusively from European funds (France and Poland), in combination with state funds (Spain and Austria), regional funds (Sweden), or whether there is a framework for collaboration with the private sector (Portugal). In many cases, there is still no clear funding scenario beyond the current projects funded by the European Commission for establishing the centres.

Participants also stressed the importance of the European Commission's announcement regarding cuts to social spending and the termination of direct funding for establishing NCCs once the current projects conclude.

During the breakout sessions in the second part of the event, participants agreed with the overall diagnosis and emphasised the following enablers: the importance of human connection, the need to start collaborating on practical activities (e.g. preparing for ESF+ SI calls), the need for time to build trust and common understanding, which implies long-term and regular funding. A cross-sectoral approach can be achieved by onboarding other ministries into different activities, such as research on SI. Areas for improvement are mainly linked to the shift from a culture of audit and compliance to a culture of trust and risk-taking, and improving understanding of social innovation among ESF+ MAs and governments.

2.3. Impact

Participants agreed on the need to design a financing roadmap for all NCCs. This roadmap would include: (1) mapping all possible sources of funding, (2) interacting with the ecosystem to determine the necessary type of funding for each case, (3) providing advice on funding collaborative projects, and (4) introducing new mechanisms to fund portfolios of experiments rather than isolated projects.

Participants gained an overview of the various factors and actions that can improve cooperation between ESF+ MAs and NCCs in their respective MS. Depending on their specific legal, administrative, and policy contexts, NCCs can initiate and develop collaboration efforts further.

- To support this, they may draw on concrete examples of activities undertaken by the Swedish and Austrian NCCs, which have effectively helped ESF+ MAs to leverage the ESF+ to foster social innovation. The various funding routes can be explored in connection with joint activities to be developed.
- Additionally, NCCs and ESF+ MAs can use examples from other Member States as 'precedents' to facilitate dialogue and help overcome national obstacles (e.g. SI capacity-building and training activities, regular communication on topics of common interest, joint planning, SI call preparation, and project selection support, etc.). Transnational cooperation allows to move beyond conditioned ways of thinking anchored in national contexts. For instance, the Netherlands plans to use the Czech Republic's model of collaboration between the ESF+ MA and NCC as a blueprint.

3. Lessons learned

3.1. What went well

Participants considered joint working sessions between NCCs and ESF+ MAs to be very useful and appreciated the presentation of a wide range of funding examples rather than a one-size-fits-all solution, and welcomed the level of detail of the established mechanisms, such as payment by results in Portugal and the possibility of simpler administrative procedures for social innovation projects (Spain).

Participants welcomed the overview of the challenges and positive factors for collaboration, as this provides a useful shared diagnosis and points at possible improvements. They also appreciated the practical dimension of the presentations by the Swedish and Austrian NCCs, as well as the dialogue format, which facilitates comparison and offers a more dynamic presentation.

3.2. Areas for improvement

The aim is to develop joint intervention strategies and ensure that funding is directed towards a collaborative approach to complex challenges, rather than isolated projects.

In terms of content, the factors that support effective cooperation between ESF+ MAs and NCCs would benefit from being discussed in more detail in small groups on each factor, with the aim of translating them into concrete actions in various MS contexts.

With regard to format, the joint event would benefit from being longer.

To effectively assess the relevance and impact of the events and further adapt and improve them, it is important to encourage participants to complete and return evaluation forms, emphasising the value of their feedback.

3.3. Recommendations

It was very useful to ask ESF+ MAs how NCCs could help them to better manage funds for social innovation. Rather than requesting funds in a generic way, it is recommended that NCCs respond directly to the needs of government agencies. Some people, who had questioned this direct relationship due to the operational limitations it could impose on NCCs, now consider that experience has shown it is better for NCCs to work more closely with governments. The range of possible collaborative actions between ESF+ MAs and NCCs can serve as a good starting point for identifying the needs of the government and ESF+ MAs, and for switching from individual project support to systemic change.

4. Next steps

4.1. Follow-up actions

NCCs and ESF MAs will collaborate to:

- identify all possible funding options to sustain and develop the NCCs, involving other potential funders if possible;
- establish a joint working plan to improve the use of ESF+ to support SI, notably by implementing the SI priority, based on the needs of ESF+ MAs and government;
- identify and prioritise, in each MS, a list of complex social challenges that must be addressed collaboratively, in a cross-sectoral way (other ministries, as well as end-users, if possible);
- establish the funding roadmap for each NCC, supporting the implementation of a joint activity programme/plan between NCCs and ESF+ MAs.

4.2. Future events

NCC WG study visit to Sweden. Many members of the community will visit Sweden to learn about the role academic institutions can play in the development of NCCs. This visit will also provide an opportunity to learn more about regional developments in NCCs and discuss the most effective ways to activate collaborative experimentation portfolios (rather than single-point solutions).

The findings of both the online event and the study visit will be presented at the Social Innovation Forum to be held in Brussels (1-2 October 2025).

Annexes

Annex 1: Slide-deck from the event
Annex 2: Toolkit for Portfolio Resource Mobilisation

Social Innovation + Initiative

Collaboration and Funding Strategies for the National Competence Centres

27th JUNE 2025, 09:00 (CEST)

Funded by the European Union

Opening and Welcome

Lucrezia Ioannoni Fiore

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

Introduction to the Event

Armelle Ledan

Lead Thematic Expert, Community of Practice on Social Innovation

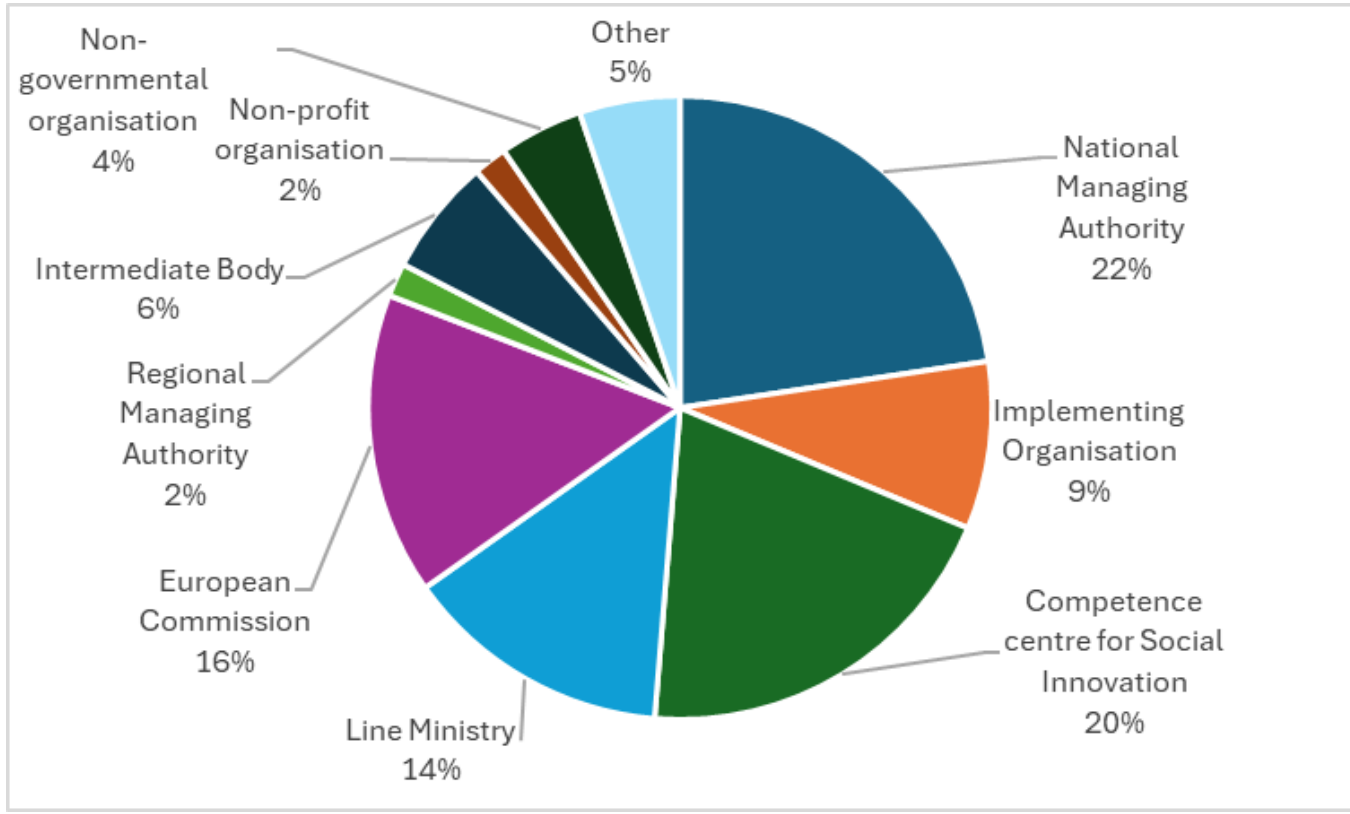
Gorka Espiau

Lead Thematic Expert, National Competence Centre Working Group

115 Participants registered

24 Member States

Type of organisation



Event main objectives

Joint SI CoP and NCC WG online session, with complementary approaches and exchanges to explore:

1. Funding road maps for the National Competence Centres (NCC WG)

2. Nature, obstacles and enablers of collaboration between ESF+ MAs and NCCs to support Social Innovation.

Both parts of the event will be illustrated by **testimonials from Member States (MS)**, followed by **parallel breakout sessions:**

1. To inspire and encourage **mutual learning** between MS and foster **possible scaling and transfer of collaboration and funding models**

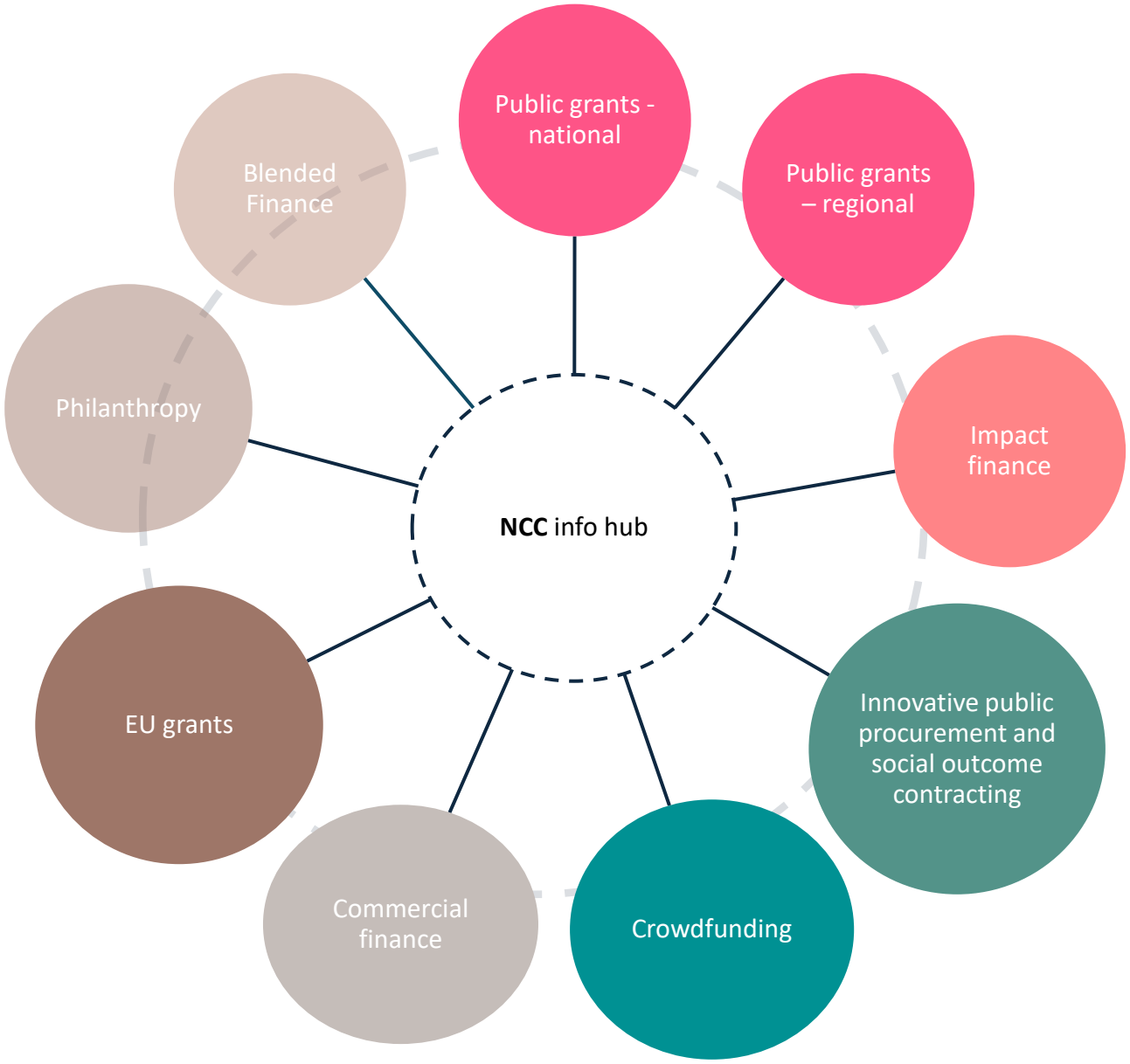
2. To inform discussions about the recently created **NCCs, their development and sustainability**, as well as the **overall debate on ESF+ post 2027**.

Funding of the National Competence Centres

Gorka Espiau

Lead Thematic Expert, National Competence Centre Working Group

Designing the finance strategy for NCCs Funding Options



Suggested Roadmap

1. **Mapping** the available options and experiences
2. **Advising** on different sources
3. **Connecting** different sources at different stages
4. **Testing. Portfolio** approach
5. **Correcting.Adaptative management**
6. **Learning. Developmental evaluation**
7. **Scaling. Evidence based knowledge transfer**

Examples of NCC funding in different Member States - testimonials:

Filipe Almeida, Portugal Inovação Social, Portugal
Zofia Komorowska and **Kuba Wygnański,** Shipyard Foundation, Poland
Berta González Antón, State Secretary for Social Rights, Spain

Fundusze Europejskie dla Rozwoju Społecznego

Rzeczpospolita Polska

Dofinansowane przez Unię Europejską

Social Innovation National Competence Centre in Poland

aka Social Innovation Catalist

How is it financed?

National activities

Fundusze Europejskie
dla Rozwoju Społecznego

Rzeczpospolita Polska

Dofinansowane przez
Unię Europejską

Transnational activities

Co-funded by
the European Union

Social
Innovation
Initiative

Google.org

shipyard

National activities

- long-term project developed under national ESF operational programme (1st edition 12.2019-12.2023; 2nd edition 04.2024-03.2029)
- open call with one grant “winner”
- 2nd edition: approx. EUR 2.8 million

- partnership required (Shipyard Foundation and Foundation for Social and Economic Initiatives)
- specific experience required (i.e. in incubating social innovations, in social impact measurement)
- a relatively concrete list of tasks (expectations)

- long-term, trust-based relation
- reasonable flexibility
- openness to new forms of activities and themes
- still informal nationwide network (individuals, legal entities)

www.innowacjespoleczne.pl

innowacjespolecznepl

innowacje.spoleczne

Funding of the National Competence Center

Spanish experience:

Aligning innovation, policy and funding: a mission-based approach

BiRDS
Boosting Initiatives
& Resources to Develop
Social innovation

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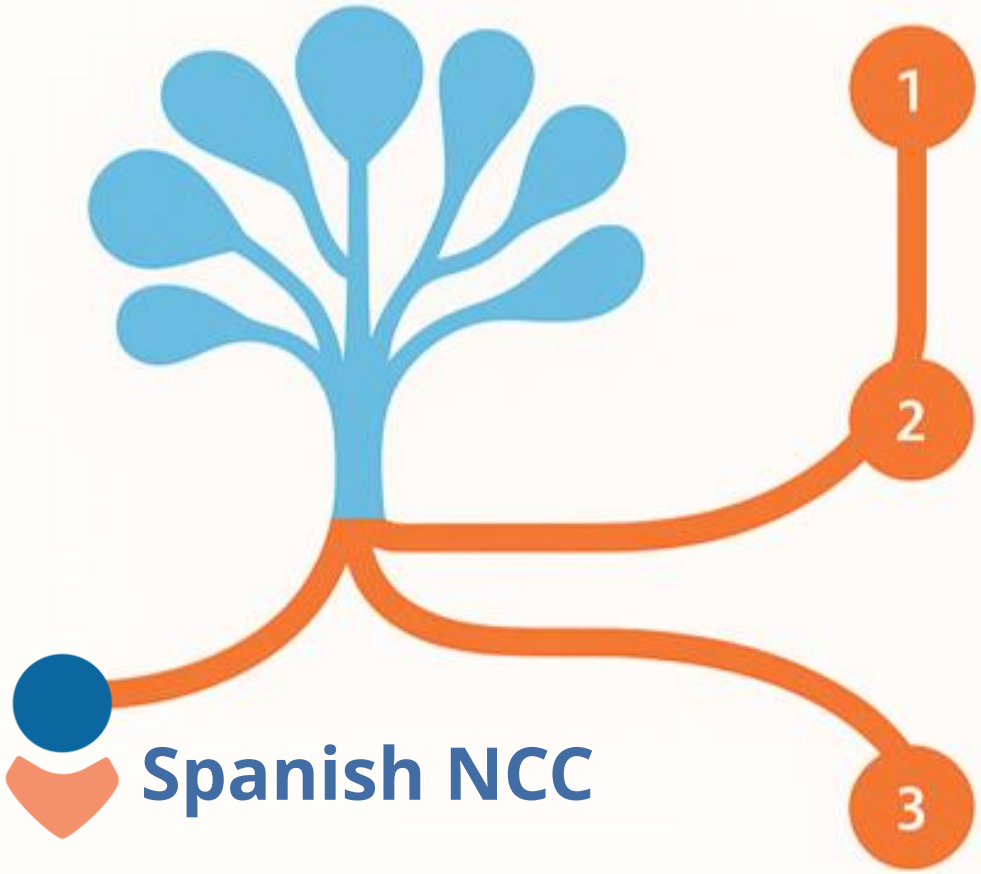
Innovation
Initiative

BUILDING MISSION-ORIENTED INNOVATION IN SPAIN

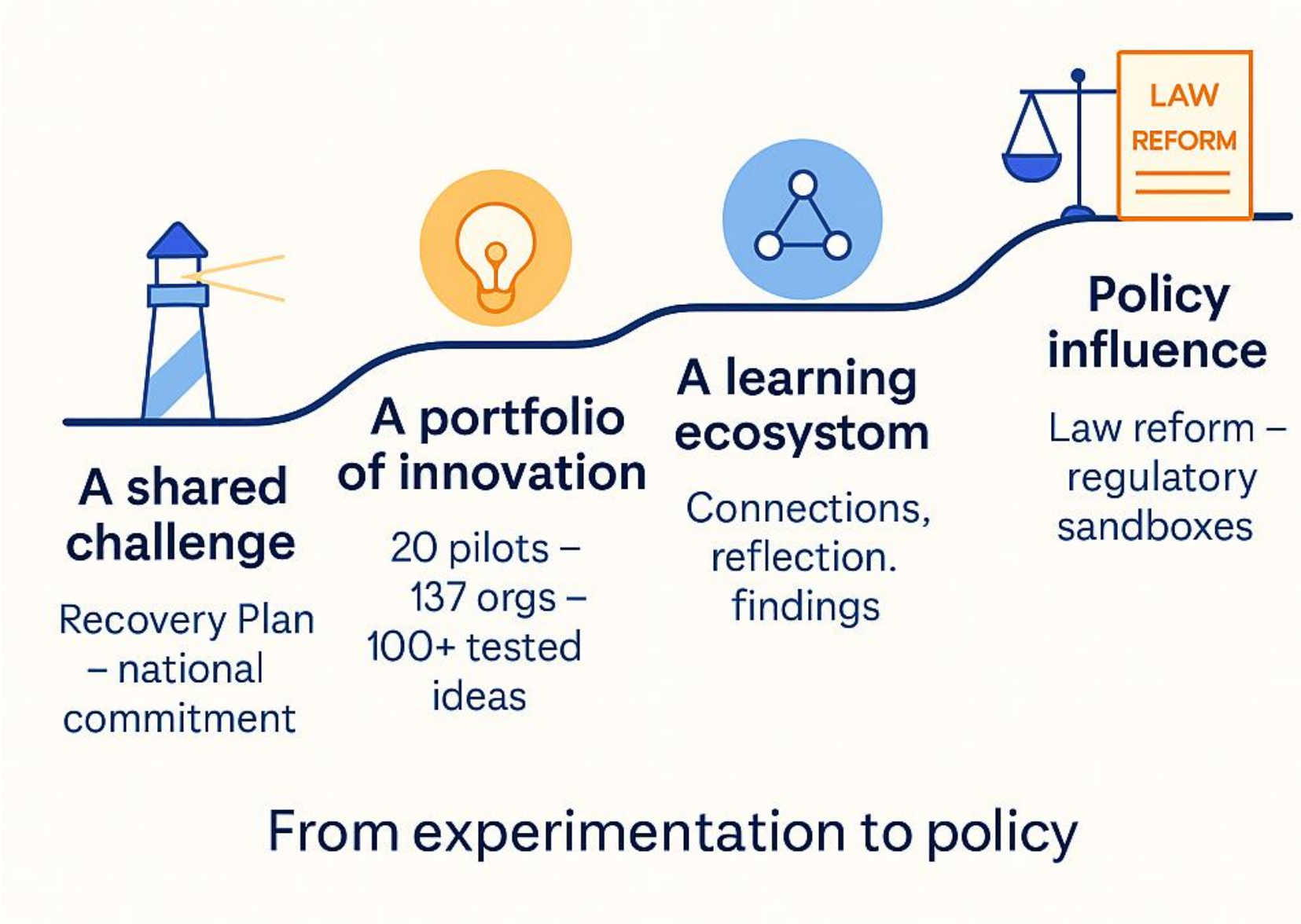
- Shared mission to address complex social challenges
- Inter-ministerial alliance driving systemic change
- €145M from ESF+ for social innovation
- A portfolio of 100 innovations tested through the Recovery Plan: a large-scale experiment in mission-driven funding and learning system

BUILDING THE COMPETENCE CENTER FROM PRACTICE



1. Public leadership and institutional design
2. Connecting fragmented ecosystems
3. Mission-driven experimentation

FROM PILOTS TO POLICY: SPAIN'S DEINSTITUTIONALISATION PATH

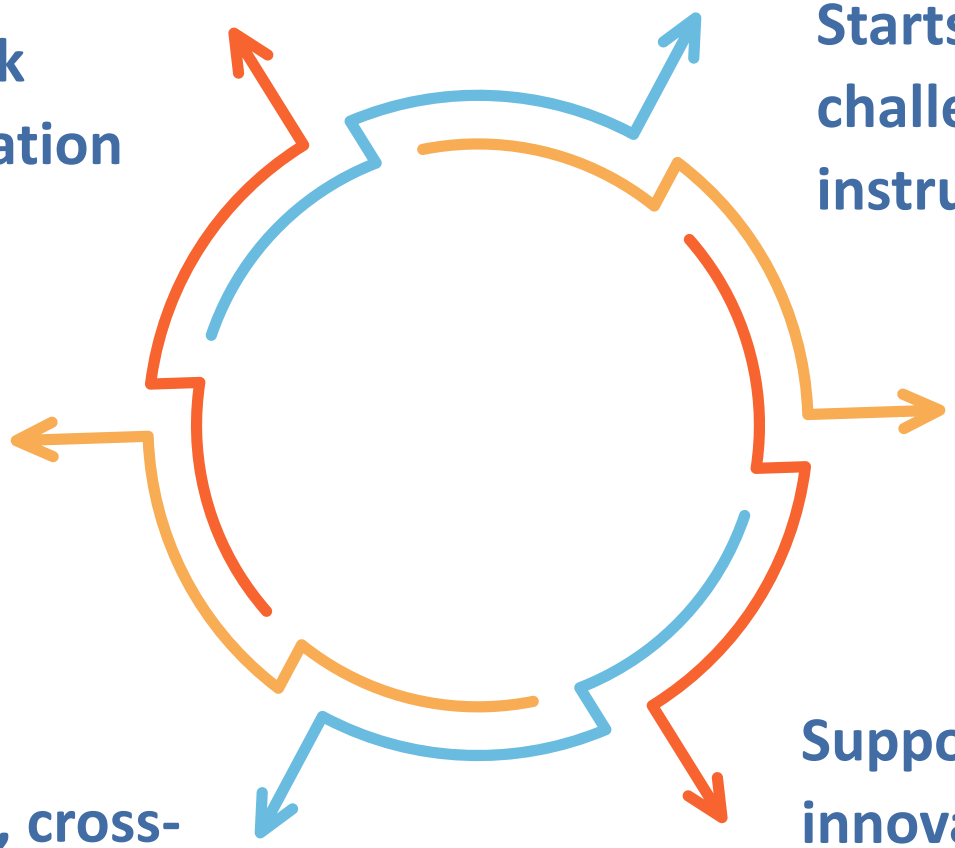


MISION ORIENTED FUNDING: A SHARE VISION

Innovative action requires innovative funding

Combine diverse forms of capital and fast track processes for innovation

Starts with shared challenges, not just instruments



Promotes learning, sustainability and transfer

Aligns with public policy priorities

Enables flexible, cross-sector collaboration

Supports the full innovation lifecycle

Breakout Session 'Designing and Implementing a Funding Roadmap for NCCs' facilitated by

Armelle Ledan, Lead Thematic Expert, SI CoP
Gorka Espiau, Lead Thematic Expert, NCC WG
Eglė Butkevičienė, Thematic Expert, NCC WG
John Healy, Thematic Expert, NCC WG

- What is the most interesting/useful example from Portugal, Poland or Spain?
- Do you have any other practical example to share of how your NCC is designing or implementing a funding strategy for the future?
- If you are a Managing Authority of ESF+, could the NCC help you to better distribute social innovation funding in your member state? How?

Feedback from Breakout Session

Collaboration Between the ESF+ Managing Authorities and the National Competence Centres to Support Social Innovation

Armelle Ledan

Lead Thematic Expert, Community of Practice on Social Innovation

Collaboration between the ESF+ MAs and the NCCs

2020 Call – NCC functions

(*Creation*)

Capacity building of key SI stakeholders, notably ESF MAs

- Professional support services, from design and development, to assessment, scaling and mainstreaming

Transnational transfer of knowledge

- Knowledge and know-how, models and examples, tools and practices consortium

Creation of synergies between EaSI and ESF in view of scaling with ESF support

Networking and cooperation with other NCCs (CoPs)

2022 call – NCCs role and functions

(Development)

Function as a facilitator and a hub

- New relationships & collaborations between practitioners and support organisations

Become a resource centre

- Use of suitable tools, methods, examples, models & practices

Facilitate the mainstreaming of successfully tested innovative approaches

- "Push": **assisting SI initiatives** in validating, documenting, communicating, and transferring their innovative approaches and facilitating access to funding;
- "Pull": identifying the **needs and demand for innovative models** specific to national/regional context;

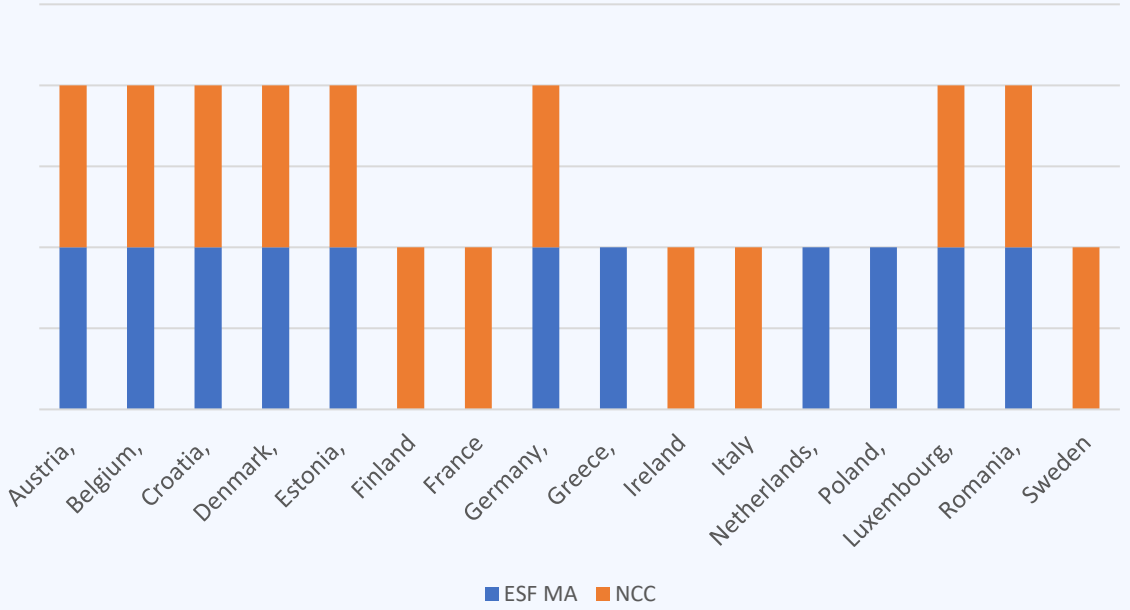
Contribute to the development and continuous improvement of policies and actions

- Shared understanding and analysis of the state of development of the national SI ecosystem

Collaboration between the ESF+ MAs and the NCCs to support social innovation

- **Survey launched 29 May**
- **28 answers from:**
  - 13 ESF+ MAs from 11 MS
  - 15 NCCs from 13 MS

Austria, Belgium, Croatia, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Poland, Luxembourg, Romania, Sweden, Spain



SURVEY QUESTIONS

1. **What are the main obstacles you experience in the collaboration with ESF+ Mas / NCCs?**
   Please describe the nature of these challenges and explain why you believe they occur.

2. **What aspects of your collaboration with ESF+ MAs / NCCs have worked well?**
   Please explain what contributed to this success.

Different perspectives

ESF MAs

Obstacles to collaboration

- **Low political priority** given to SI and NCC for SI
- Lack of cross-sectoral & transversal support to SI
- Lack of knowledge & mutual understanding

Enablers of effective collaboration

- NCC dedication and competences
- Human qualities
- Good communication
- Common vision to plan and work together
- Institutional and financial support
  - Sustained cooperation through ESF funding of NCCs
  - Institutional links / integration
- Connecting ESF+ MA with NCC networks and SI ecosystem

NCCs

Obstacles to collaboration

- **Low political priority** and **low understanding** of SI
- Lack of coherent and cross-sectoral support to SI / silos
- Administrative and regulatory burdens linked to ESF
- ESF+ MAs internal issues (resources, availability)
- Lack of dissemination of results

Enablers of effective collaboration

- Human dimension of effective cooperation, including communication
- Competencies and credibility of NCCs
- Proactive NCCs and responsive MAs
- NCC calls as catalysts
- Value of the SI CoP as a connector

Analysis

COMMON GROUNDS

Shared recognition of main obstacles

- Low political prioritisation of social innovation
- Cross-sectoral challenges
- Complex governance and unclear roles of ESF+ SI ecosystem
- ESF+ rules and administrative burdens

Enablers of effective collaboration

- Direct ESF+ funding of NCCs
- Human qualities and relationships
- Communication and joint planning
- Shared vision, joint initiatives and practical collaboration
- EU-level exchanges through the SI CoP
- At MS level, connections between ESF+ MAs and NCCs' national ecosystems
- Institutional alignment

COMPLEMENTARY ROLE AND EXPERTISE

- **NCCs bring** SI expertise, skills and networks.
- **MAs bring** administrative skills, access to EU funding mechanisms and possible funding**.**
  - **Capacity-building initiatives** led by NCCs (training, SI masterclasses) for ESF+ MAs.
  - **Proactivity from NCCs with openness from MAs,** even if MAs are more reactive.

Examples of collaborations in different Member States - testimonials:

Barbara Willsberger, L&R Social Research, Austria

Anna Tengqvist, Forum for Social Innovation, Sweden

NCC AUSTRIA

L&R Social Research - private scientific institute

arbeit plus – Austria-wide network of around 200 non-profit social enterprises

Dialog Plus – Office for Participation and Social Innovation

Social Entrepreneurship Centers of the Vienna University of Economics and Business

Center for Social Innovation (ZSI) - private non-profit institute for applied social sciences and a center of excellence for social innovation

Mission: Central point of contact and support structure for the optimal implementation of the priority 'Social Innovation"

Funded by ESF+ technical assistance and the Austrian Federal Ministry of Labour (ESF+ MA)
Implemented through call-offs within the framework agreement

Budget: 2023-2028 1,7 M Euro (40% ESF + 60% national)

NCC SWEDEN

Forum for Social Innovation Sweden

National knowledge and collaboration platform for social innovation and social enterprise.

Nodes at 6 universities.

Founded in 2010 at Malmö University.

Mission – to promote lasting and value-creating social innovations in the implementation of ESF+.

Funded by ESF+ as a strategic project to support social innovation in ESF+ and to strengthen the SI ecosystem

Budget:
2023-2025 - 1,5 M Euro
2026-2029 - 1,7 M Euro

Collaboration between MA and NCC

- Missions and functions of NCC were defined with the ESF MA (based on experiences of 1st NCC call)
- With the aim to reduce administrative burdens and save resources for the ESF MA
- Regular communication formats →open, transparent, and solution-oriented
- Needs-based annual work plan
- Communication on an equal footing

Functions of SI Plus

Build a shared understanding	Identify and frame the challenges	Search for innovations with potential	Assess the evidence	Guide the Scaling-up pathway	Promote continuous learning	Work towards mainstreaming
• Identify stakeholders (mapping) • Workshops • Guidance documents (IBs + project promoters) • Website + Social Media activities	• Direct counselling services for IBs • Innovations-labs • Experimental rooms, ...	• Mapping • Good practice examples	• Analyses of the potential for each ESF+-SI-Project • Guide impact management and impact measurement	• Co-creation of scaling plan for each ESF+-SI-Project • Guidance Paper „Scaling“	• Guidance Papers • Workshops • Website	SI-Strategy for Austria (focus on ESF+)

European Commission: Directorate-General for Employment, Social Affairs and Inclusion and Barnett, S. J., Scaling-up social innovation – Seven steps for using ESF+, Publications Office of the European Union, 2022, https://data.europa.eu/doi/10.2767/68505

Website siplus.at

COLLABORATION

Tasks and missions formulated in dialogue between MA and NCCSI, but “steered” by the call from the ESF

Sounding board in relation to support on project, organisation and system level

Meetings every 2-3 weeks

NCCSI contributes with knowledge on social innovation, and improved efficiency in implementing the ESF+

Working plans developed and updated

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sociala innovationer partnerskapet för
Medfinansieras av Europeiska unionen

COMPETENCE CENTER LEVELS

ANALYSIS & LEARNING

Data collection

Cluster evaluation

Annual analysis report

Scientific reference group

Pot. research publications

SYSTEM LEVEL – scaling, financing, national/regional upport structures, etc.

Involved actors: Competence center team, key actors in the ecosystem

PROGRAM LEVEL – the call process, reflection meetings, learning sessions, etc.

Involved actors: Competence center team, The Swedish ESF council

PROJECT LEVEL – coaching, coalition meetings, cluster evaluation, etc.

Involved actors: Competence center team, ESF-funded projects

Co-funded by the European Union

PROCESS OF CALLS ESF, NCC input

ESF CALLS PLANNED AND PRIORITIZED	ESF CALLS PUBLISHED	ASSESSMENT OF APPLICATIONS	ONGOING PROJECTS	RESULTS AND LEARNING FROM PROJECTS
Input to calls – survey, dialogue process Reports on call thematics Mobilising relevant actors &sectors *Indicators*	Mobilising Matchmaking Workshops on social innovation Supportive materials on social innovation, films, models	Assessment criteria Descriptions of social innovation Workshops ESF staff	Learning events for projects, yearly conference Analysis, identify promising social innovations *Model for impact assessment*	Learning from innovations to funder *Implementation and scaling of innovations* *Connection to policy level*

Achievements and Challenges

Challenges:

- Administrative procedures and the regulatory framework vs. social innovative solutions

Achievements:

- Learning processes at the administrative level →administrative innovations (e.g. participatory approaches for the call-development, new form of validation for the result indicator, etc.), strong focus on practical, needs-based solutions (on both sides MA and NCC)
- New collaborations at project level and expansion of the circle of potential project partners/promoters
- Building bridges and exploiting synergies between ESF+, LEADER, ERDF, social entrepreneurs etc.

ACHIEVEMENTS

Build on “ordinary” goals and tasks of the MA, work closely in relation to these

Build on existing support of social innovation in the organisation

Explore how social innovation methods and approaches can improve the implementation of ESF+

Shared learning processes through CoP and study visits have helped

Connect the MA with the ecosystem for social innovation in Sweden

CHALLENGES

Lack of policy support a challenge for implementation of a national NCCSI

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Stay in Contact!

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THANK YOU!

FORUM FOR SOCIAL INNOVATION SWEDEN

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Breakout Session 'Making the most of NCC support' facilitated by

Armelle Ledan, Lead Thematic Expert, SI CoP
Gorka Espiau, Lead Thematic Expert, NCC WG
Eglė Butkevičienė, Thematic Expert, NCC WG
John Healy, Thematic Expert, NCC WG

- **Collaboration enablers:** what enablers presented *(background note, testimonials)* resonated with you? Something you could try in your context? Would anyone like to share a tip/experience that improved the collaboration?

- **Areas for improvement:** what would help your collaboration more effective/ impactful (e.g. communication, role clarity, timeline, resources, concrete support)?

If time allows: Dream !

- **If you could change one thing in your MA–NCC collaboration, what would it be?**

Feedback from Breakout Session

Conclusions

Armelle Ledan

Lead Thematic Expert, Community of Practice on Social Innovation

Gorka Espiau

Lead Thematic Expert, National Competence Centre Working Group

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Thank You!

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European Competence Centre for Social Innovation:
ESF+ Community of Practice on Social Innovation and
National Competence Centres Working Group

Toolkit for Portfolio Resource Mobilisation

August 2025

Funded by the European Union

Prepared by: Gorka Espiau, Eglė Butkevičienė, John Healy in collaboration with Armelle Ledan and the Community of Practice on Social Innovation team.

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Introduction

This manual supports National Competence Centres (NCCs) in developing a resource mobilisation strategy from a portfolio perspective. Unlike traditional funding strategies that focus on isolated social innovation initiatives, this approach centres on a set of interconnected initiatives.

Traditional approaches have major limitations as initiatives are designed and funded as single-point solutions. However, Europe's main social challenges, such as creating quality jobs, redesigning the care system, tackling inequality and responding to migration, are complex and cannot be addressed by isolated solutions. Also, most of the difficulties in addressing these societal challenges lie in the implementation phase. This requires surfacing and addressing complex, often contested issues, and collectively discussing how best to resolve them.

Adopting a portfolio perspective transforms the role of NCCs from simple fund distributors or advisors for isolated initiatives into strategic actors capable of orchestrating interconnected solutions. This approach enables NCCs to maximise systemic impact by aligning multiple funding sources, supporting diverse initiatives simultaneously and creating conditions for social innovation to thrive sustainably on a large scale. Ultimately, it strengthens their position as catalysts for change within their national social innovation ecosystems.

To implement this approach effectively, NCCs need a combination of strategic and operational competencies. These include the ability to map and analyse funding sources systematically, advise initiatives on funding options and portfolio strategies, connect diverse stakeholders across sectors and funding types, support the implementation of complex funding structures and evaluate both individual and collective outcomes. Skills in ecosystem mapping, analysing and prioritising complex social challenges in collaboration with policy makers, as well as facilitation, systems thinking, partnership building, and developmental evaluation, are essential to fulfil their role as advisors, connectors and enablers of systemic social change.

While this manual follows a sequential roadmap, its components are designed to be modular and adaptable, allowing for iterative use and flexible reordering based on specific needs.

Suggested roadmap

1	Mapping the available options and experiences
2	Advising on different sources
3	Connecting different sources at different stages
4	Testing. Portfolio approach
5	Evaluating, adapting and transferring knowledge

Step 1. Mapping

The first step in mobilising resources from a portfolio perspective is to identify all the existing funding sources for a specific complex social issue in each Member State, as well as at an international level (see Figure 1).

Example: Identifying all funding possibilities for initiatives that want to reduce the number of homeless people in Ireland.

Figure 1 Example of a visualisation of possible funding sources

Key ideas:

- Identify all potential sources of funding options related to a particular complex challenge.
- Start with the most accessible and better-known sources (Public grants, EU calls, Philanthropy).
- Explore different types of funding instruments (grants, loans, etc.).
- Include national and international options.
- Use partners' knowledge of funding sources and known funders to complete the mapping exercise (pool information and knowledge).

Suggested guide for step 1

The NCC should map the following categories:

- **European funds:** Financial instruments provided by the European Union to support projects and policies that promote economic, social and territorial cohesion among Member States.
- **State funds:** Funding allocated by national governments to support public services, programmes and strategic initiatives within their countries.
- **Regional and local funds:** Financial resources provided by regional and/or local authorities to support development projects and services within their specific territories.
- **Philanthropy:** Voluntary donations from individuals, foundations, or corporations to support charitable causes or public benefit initiatives without expecting financial returns.
- **Impact finance:** Investments made with the intention of generating a measurable social or environmental impact alongside a financial return.
- **Social Outcome Contracting (SOC):** Funding mechanisms where payments are made based on the achievement of predefined social outcomes, such as Social Impact Bonds (SIB).
- **Commercial finance:** Financial resources provided by banks or private investors seeking market-rate returns through loans, credit, or equity investments.
- **Crowdfunding:** The process of raising small amounts of money from a large number of people, typically via online platforms, to finance a project or initiative.
- **Others:** Any additional sources of funding not covered above, such as in-kind contributions, volunteer time, or barter-based resources.

Step 2. Analysis and advising

The second step is to assess the strengths and limitations of each identified funding source. This may result in a table summarising these elements, helping to determine the most suitable type of funding for each initiative, while recognising that all are required within the overall portfolio.

This process prevents over-specialisation in a single type of financing (e.g. SOC) and enables the NCC to act as an advisory and connecting body within the social innovation ecosystem of each Member State. In this role, the NCC can guide each initiative on the most appropriate funding options at different stages of its life cycle.

Example: Assessing which funding sources are best suited to supporting youth employment programmes in Portugal and analysing their strengths (e.g. stable state funding) and limitations (e.g. slow disbursement processes).

Key ideas:

- Analyse strengths and weaknesses (limitations) of the identified funding sources.
- Advise on different funding sources and tools (funders, beneficiaries and regulators).
- Analyse dependency against financial management complexity. Combining different sources of funding is good but difficult to manage for small structures (it is skills- and resource-intensive).

	Public grants - national	Public grants - regional	Impact finance	SOC	SIB	Commercial finance	EU grants	Philan-thropy
In what context								
Pros								
Cons								

Figure 2 A suggested tool for analysing funding sources and providing advice

Step 3. Connecting

Once the mapping and analysis of strengths and limitations are complete, the NCC should propose new connections between existing funding sources and social innovation entities, as well as potential connections between the entities themselves.

This is the stage where the integrated portfolio perspective comes into play. As an initial action, it is recommended to propose 10 possible connections between funding sources and entities, along with connections between the entities (see Figure 3).

Example: Proposing connections between a regional fund that supports green energy projects and a local cooperative in France that works on solar panel installation, while also connecting them with an EU climate innovation programme.

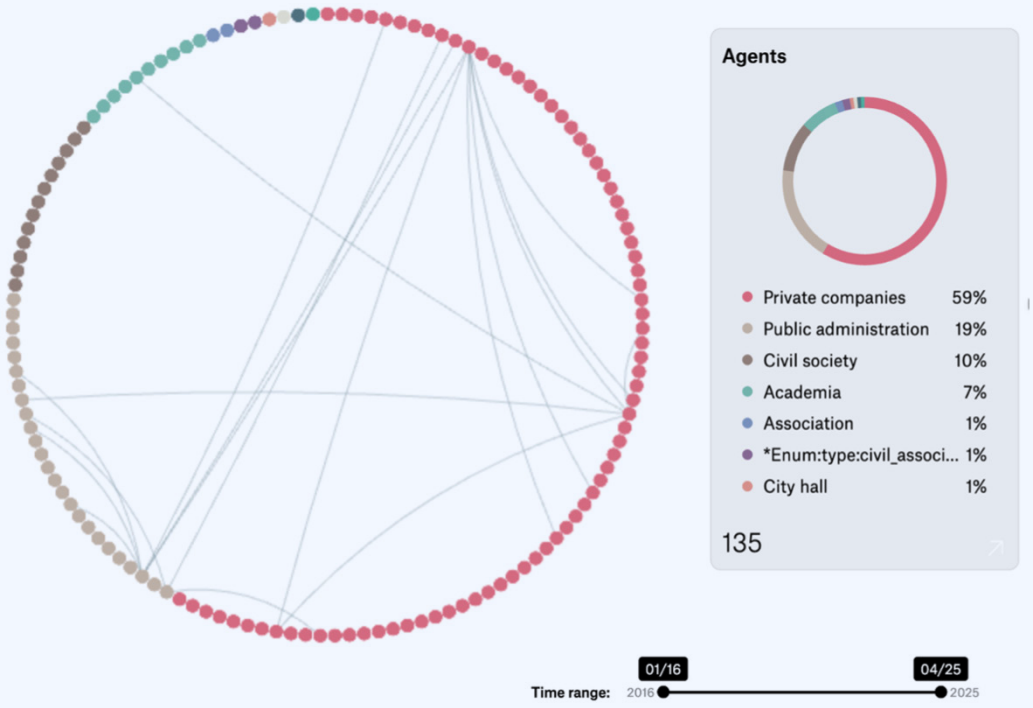

Figure 3 Example of a visualization of connections

Key ideas:

- Connect funders and social innovation initiatives.
- Orchestrate different types of possible funding at each stage.
- Apply a co-creation approach if needed.

Connection examples:

- **Relational connections:** Connections based on existing relationships, networks, or trust between funders and social innovation entities.
- **Collaborations or projects in common:** Connections where entities are working on similar projects, sharing goals, or jointly implementing initiatives.
- **Geographical connections:** Connections between funding sources and entities operating in the same region, city, or local area.

Step 4. Testing

The NCC will not only suggest funding connections, but also accompany the co-creation and implementation of initiatives.

This guidance and support will facilitate the discovery of whether the funding is well structured, and whether modifications to management and evaluation processes, as well as the incorporation of new tools identified in steps 1 and 2 (see Figure 4), need to be made.

Example: Testing whether the blended funding structure for migrant integration initiatives in Spain (combining philanthropy and SOC) is effective, and adjusting management or evaluation processes as necessary.

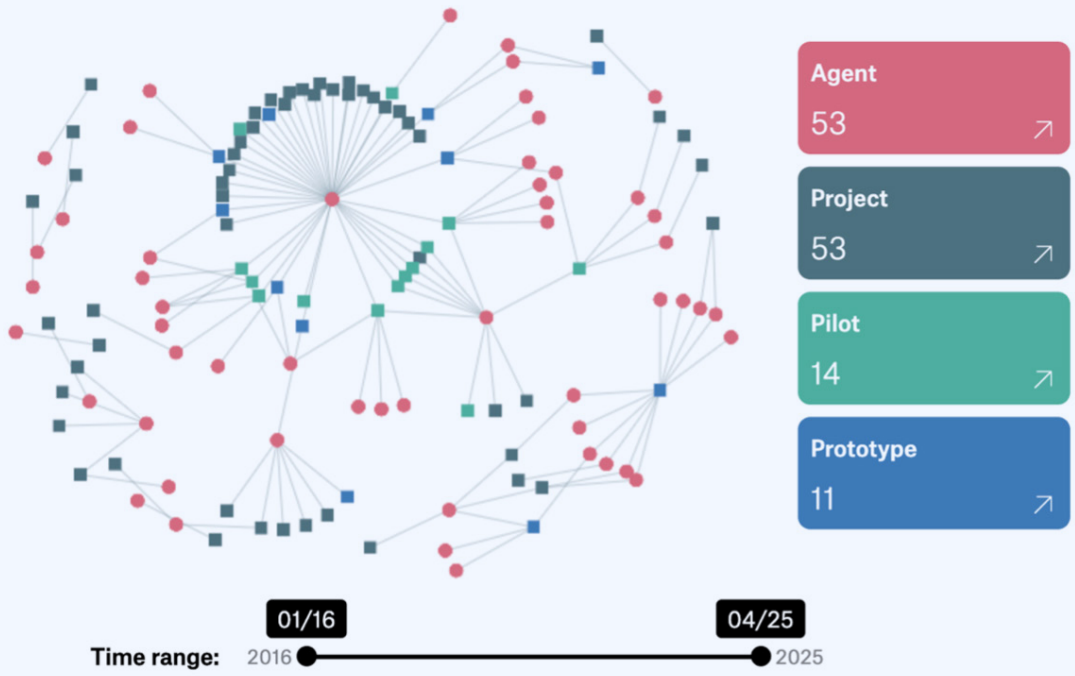

Figure 4 Example of a testing visualisation of connecting between different type of initiatives

Key ideas:

- Visualise the entire investment.
- Offer a risk identification and management strategy.
- Differentiate between risk levels and suggest risk mitigation measures.
- Acupuncture mindset.

Figure 5 presents a suggested tool for step 4.

Initiative	Funding source(s) (Step 1 Mapping)	Strengths & limitations (Step 2 Analysis)	Proposed connections (Step 2)	Is funding well structured? (Yes/No)	Management adjustments needed?	Evaluation adjustments needed?	New tools or funding options to incorporate (Steps 1 & 2)	Risks identified	Notes/ Next actions

Figure 5 A suggested tool for testing

Step 5. Evaluating, adapting and transferring knowledge

The NCC can bring together all the relevant actors to evaluate the impact of the portfolio. Rather than assessing each initiative in isolation, the evaluation indicators must include both individual measures (for each initiative) and collective measures (for the entire portfolio). Combining these two types of indicators is crucial for understanding the overall impact. Some initiatives may have limited impact individually but are essential for the success of the portfolio as a whole (see Figure 6).

Example: Training or community-building projects may not generate immediate results and can even operate at a loss initially, but they are necessary to ensure the sustainability and effectiveness of other initiatives within the portfolio.

Figure 6 Example of a visualisation of a portfolio impact assessment where all stakeholders can see how many initiatives (and what type) are responding to the different perceptions of the same challenge.

Key ideas:

- Incorporate collaborative management support.
- Use real-time visualisation.
- Include new funding incentives.
- Incorporate developmental communication.
- Set new KPIs and indicators.
- Identify new incentives.
- Perform developmental evaluation.

Examples of collective portfolio indicators that can be used include:

- the number of new connections created between initiatives;
- the quality of those connections, as rated by stakeholders;
- the number of stakeholders involved in co-creation processes;
- the percentage of initiatives using specific finance models;
- the diversity of funding sources mobilised;
- the total amount of funding mobilised;
- the number of systemic changes influenced, such as new policies or institutional practices;
- the number of emerging outcomes identified through developmental evaluation;
- increase in community resilience;
- evidence of narrative change achieved;
- the number of initiatives replicated or scaled up in other regions;
- the percentage of initiatives with adaptive evaluation systems in place.

Glossary

- **Acupuncture approach:** A strategy that targets key leverage points to create systemic change with limited resources.
- **Blended funding:** Combining multiple types of funding (public, private and philanthropic) to finance an initiative.
- **Co-creation:** A collaborative process involving multiple stakeholders in the design and implementation of solutions and ensuring shared ownership and relevance.
- **Connecting funds:** The process of linking funding sources to initiatives and facilitating relationships between them to maximise impact.
- **Developmental evaluation:** An evaluation approach that supports real-time learning and adaptation in complex systems.
- **ESF+:** The European Social Fund Plus, which supports employment, social inclusion and skills development across the EU.
- **Impact finance:** Investments that aim for a measurable social or environmental impact alongside a financial return.
- **Mapping:** A systematic process of identifying and organising existing resources, actors, or funding sources related to a specific social issue.
- **NCC (National Competence Centre):** A national-level body that supports the development and scaling of social innovation.
- **Portfolio perspective:** An approach focusing on a set of interconnected initiatives rather than isolated projects.
- **Protected experimentation:** Safe spaces or frameworks that allow new solutions to be tested with managed risks.
- **Social innovation:** New solutions that address social needs more effectively than existing approaches.
- **Social Outcome Contracting:** A funding model where payments are tied to the achievement of predefined social results.

Additional Resources

- **EU Funding Programmes:**
  1. European Commission – Funding & Tenders Portal
  2. Social Innovation MATCH
- **Portfolio approaches in social innovation:**
  Nesta. *Funding innovation guide*
- **Impact finance frameworks:**
  OECD (2019). *Social Impact Investment 2019*
- **Developmental Evaluation:**
  1. Developmental evaluation: Applying complexity concepts to enhance innovation & use
  2. A practitioner's guide to developmental evaluation
  3. A developmental evaluation primer
- **Social Outcome Contracting practical examples:**
  Government Outcomes Lab, University of Oxford – GO Lab Resources
- **Blended finance examples and tools:**
  Convergence – Blended Finance Primer

Social Innovation + Initiative

Activating innovations for social change

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