COOP-IN

PROJECT TITLE: Social Innovation Training for Virtual Work-Based Learning
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IO1:
APPLIED SOCIAL INNOVATION TRAINING COURSE DEVELOPMENT

NEEDS ANALYSIS
NATIONAL RESEARCH REPORT: PORTUGAL

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1. INTRODUCTION

What is COOP-IN?
The overall aim of COOP-IN is to raise awareness of the opportunities and challenges in implementing social innovation at work by developing a social innovation training kit including a digital education game, a self-assessment tool and other learning materials.

In so doing, the project will work with vocational education trainers, business support agencies, mentors and coaches and networking organisations to encourage engagement with social innovation and facilitate use of resources to assist small and medium enterprises (SMEs) in moving from idea to action in introducing social innovation.   The project consists of seven partner organisations from the UK, Cyprus, Ireland, Hungary, Portugal and Spain.

Why is COOP-IN needed?
In 1985, Peter Drucker noted that '*Today businesses, especially the large ones, simply will not survive in this period of rapid change and innovation unless they acquire entrepreneurial competence* (Drucker, 1985, p. 132). Thirty years on, many commentators would agree that this quote is still highly relevant today – the only thing that has changed is the rate of change.

This reflects the fundamental shifts which we are witnessing in economies, such as the UK, as a result of the economic recession of 2008/2009, demographic changes, technological developments and socio-cultural shifts. For example, demographic change is leading to greater age and cultural diversity within the workforce of the majority of businesses. For the first time, businesses will have staff from four different generations who have different motivations, values and expectations around working patterns and management and leadership styles. People are having to work longer and cope with personal change, such as ageing, whilst at work rather than during retirement. In turn, this creates a set of different learning and skills development needs and generates the need for innovative responses from businesses themselves, external providers of education and training and governments.

As a result, there is a growing interest in the concept of social innovation. This can be defined as '*new strategies, concepts and ideas that businesses and organisations can introduce to meet the social needs of different internal and external stakeholders*'. However, the available evidence base suggests that there are a number of "need to know's" in navigating the journey from idea to action in implementing social innovations at work.

Why a needs analysis?
COOP-IN will develop a digital education game, a set of learning materials and a self-assessment tool to assist businesses and organisations in introducing and managing social innovations at work. To ensure that these outcomes are demand-led, a needs analysis will be undertaken in each partner country. This report summarises the key outcomes to emerge from the needs analysis undertaken in Portugal.

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2. RESEARCH METHODOLOGY AND METHODS

The aim of our local need analysis was complex:

- On one hand, we wanted to get a better understanding of our ideal target group; what type of companies and organisations could most profit from the results of the project's planned intellectual outputs?; should we further specify the originally planned beneficiary group – SMEs -, concentrating on certain areas or company structure (e.g. startups)?; should we include NGOs as beneficiaries or/and co-creators, counting on their experience with social issues?
- On the other hand, shall we keep in our focus companies that are still inexperienced with social innovation (classical SMEs) or shall we create a practical capacity enhancement tool for the more experienced, innovation-intensive startup sector?

In this sense we aimed to receive opinions and insights regarding companies' view on social innovation from a diverse potential target group. We approached various actors, that we considered relevant or connecting to our topic: startups ecosystems, impact hubs, social innovation networks, important non-profit organisations, smart city association, SMEs from the areas of tourism, telecommunication, IT, property management, human capital and other services, universities (faculty of tourism), national business chambers and associations for innovation, commerce and entrepreneurship, municipalities, and even a few large companies with strong interest on innovation (e.g. Microsoft, Vodafone).

As a starting point, we attended the above mentioned social innovation conference in November, 2017. Building on the gained experiences we did desk-research on the local situation, and finally, we approached the target companies and organisations, first by email then by phone. They were sent a brief presentation about the project goals and outcomes, and asked to fill out the online questionnaire. We translated the partnership's questionnaire form English to Portuguese and uploaded it onto our Freeonlinesurveys.com online survey tool.

We reached answers from various sectors and expertise levels relating social innovation. Up until now we received 25 answers through the questionnaire and two more by means of face-to face interviews, all together 27 answers. Nevertheless, we strongly believe that it will be useful to keep on collecting more feedbacks and interviews, as well for the present project, as well for future developments in the topic.

Companies were cooperative and it was relatively easy to get them interested in the topic. However, they found it difficult to understand the practical goal of the development. We needed to break it down eventually to the following:

- We develop a complex training toolkit for companies and organisations - here they would always ask, to which ones, who are the main target group?- that they can use freely to enhance awareness on innovation and social innovation in general, and to enhance their capacities in a very practical way. The toolkit is innovative itself, as it has a digital game

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based learning element, completed by a face-to-face part which is more focused on enhancing cooperation within the proper team/employees.

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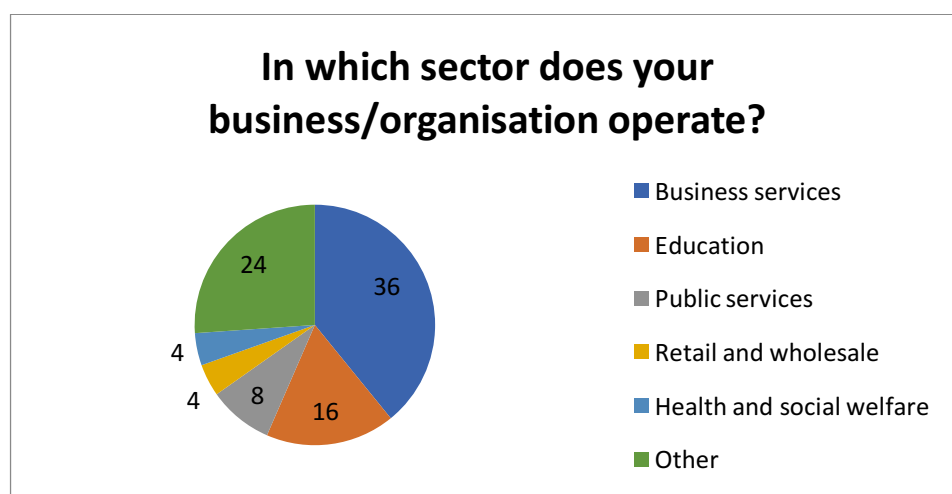of the European Union

3. ANALYSIS AND DISCUSSION

3.1 Characteristics of the respondents

As a result of our research we reached **25 online answers** from companies and organisations. Among these we find actors of various sectors and areas:

- Non-for-profit sector, such as Cooperativa Milacessos (it deals with social innovation in the area of tourism, facilitating barrier-free touristic routes and easy accessibility), "Choices Program" of the High Commission of Migration (it deals with the practical promotion of social inclusion and cohesion), the Social Investment Laboratory of the Fundação Calouste Gulbenkian (above described), or municipalities
- Higher education, such as the Tourism Department of the Universidade Europeia
- Start-up incubators, such as Beta-i and Startup Lisboa
- Innovation intensive ecosystems, such Social Impact Hub and Stone-Soup, Lisbon Smart City Hub
- Large firms, such as Microsoft, Vodafone
- Chambers and business associations
- SMEs, such as Rolloncell (information and telecommunication sector), Rosil Lda (property management and investment), LX Factory, Pinto & Cruz (engineering services), etc.
- Startups and micro companies involved or interested in innovation and social innovation, such as Super Babysitters, Weezzy, Vision Box, LX Paint, etc.

Regarding the **field of activity** of our research population, 36% of the respondents provide business services, 16% belong to the education sector, 8% to public services, 4% to wholesale and retail, 4% to wellbeing and welfare, while 24% chose the 'other' category, specifying it as tourism, travelling, social, art and entertainment, and social inclusion (see Figure 1).

**Figure 1**: Nature of business activity of the surveyed businesses

In which sector does your business/organisation operate?

- Business services — 36
- Education — 16
- Public services — 8
- Retail and wholesale — 4
- Health and social welfare — 4
- Other — 24

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As for the **organisation size**, 8 respondents represent micro enterprises (out of them seven has 1-5 employees and one 6-10), 6 respondents fall into the small business category (three has 11-25 employees, and other three 26-49), 6 responses came from medium enterprise (has 50-249 employees, and other three 250-499), while 5 answers came from large companies, organisations and ecosystems.

Most companies look back on a **history** of more than 4 years, while two has been recently founded (see Figure 2).

Figure 2: Length of trading of the surveyed businesses
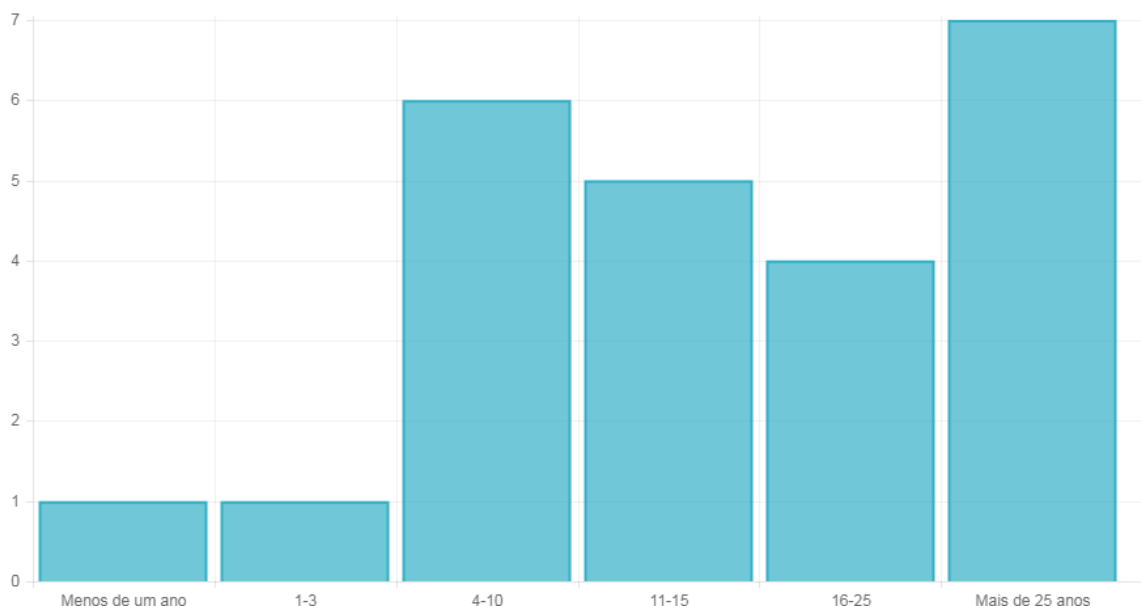
Ownership-wise, 60% of the respondents belong to the privately-owned sector (15 out of 25), 20% are publicly and 16% are community-owned organisations, besides there is one cooperative (specified under 'other').

3.2   What is Social Innovation?
To the question, '**what does social innovation mean to you?'** we received different answers:
- *Looking for new solutions (or "reinvention" of solutions / strategies that already exist) for social problems / needs.*
- *More efficient and effective solutions to complex social problems*
- *Renovation*
- *They are innovations with social purpose*
- *Something that unites people, goods or services*
- *Compliance*
- *New ways of finding the balance between companies / society*
- *New ways of achieving interaction and public participation in social causes*

- *New ideas or different ways aiming to generate positive social and environmental impact*
- *Achieving social improvement goals through innovative and creative partnerships and methods that escape the mainstream*
- *New products or services created for the common good*
- *Put new ideas, strategies, concepts and technologies at the service of the community for social purposes.*
- *Implementation of actions that have a positive impact on people's lives*
- *Streamline the social sector with innovative solutions that bring benefits to the community*
- *New forms that innovate the way we act and communicate socially*
- *Find new ways to take advantage of diversity, help create a new society based on information*
- *Develop impact initiatives that contribute to the sustainable development of the community*
- *An interactive and unprejudiced social development*
- *Ability to transform the society on which our future well-being depends*
- *Social innovation is a term that refers to new strategies, concepts and organizations that meet social needs of all kinds - from working conditions and education to community development and health - that develop and strengthen civil society.*
- *Facilitating the quality of life for different social strata*
- *Creation or implementation of products / services / events that are disruptive, change their social context and have a measurable and sustainable impact*

The definitions highlight the following key dimensions: **impact, implementation, novelty, social good/development, sustainability, and partnership/cohesion, participation.**

Table 1 below shows the number of votes given to the listed terms. For most respondents the *purpose* of social innovation seemed to be the priority, 'the meeting of a social need' was the most important factor, while 'social problem solving' was the second most popular item. The third highest number of votes pointed *on the way the purpose should be met*, 'open and collaborative', 'community spirit' and 'sustainability'.

Table 1: Terms associated with social innovation

Meets a social need	12 (48%)
Novel/new	-
Just different	-
From idea to action	5 (20%)
Effective	5 (20%)
Social responsibility	7 (28%)
New networks and relationships	7 (28%)
Social problem solving	9 (36%)
Open and collaborative	8 (32%)
Creativity	-
Co-creation	4 (16%)

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Community spirit	8 (32%)
Grassroots	6 (24%)
Change	-
Sustainability	8 (32%)
Develops capabilities and assets	-
Better use of assets and resources	6 (24%)
Improving the quality of social services	-
Cross sectoral	6 (24%)
Better performance	-
Other (please specify)	13 (52%)

Table 2 below shows the number of votes answering the question, 'to what extent do you agree with these statements'?

Table 2 : The nature of social innovation

	Totally Disagree	Disagree	Agree	Totally Agree
Social innovations are new to a sector, market or community	2	5	9	8
Social innovations are more effective than economic-driven innovations	2	10	12	1
There is a distinction between invention and innovation	1	1	9	14
Social innovations are explicitly designed to meet a recognised social need	2	10	9	4
Social innovations are just doing the same thing but in a slightly new way	9	10	6	0
Social innovation occurs at the interface between different sectors	0	3	13	9
Social innovations are developed with and by users	2	3	12	8
Social innovation involves producers and consumers working together	0	3	12	10
Collaboration increases the potential for social innovation	0	0	6	19

From the above answers we can see that there is a high deviation between the answers, however in case of the last item there is no doubt, it received only favouring opinions. Collaboration seems to be considered as one of the utmost important components of the topic.

3.3 Social innovation in businesses and organisations: Processes and practices
Based on the answers to the question **'thinking about your business/organisation, what is the scope for introducing social innovation through…'** we see that the Portuguese

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respondents gave major importance to new business processes, organisational/legal structures and new services compared to the other items (see Table 3).

Table 3: Scope for the introduction of social innovation

	Totally Disagree	Disagree	Agree	Totally Agree
New products	5	5	11	4
New services	5	1	12	7
New business processes	1	2	11	10
New markets	7	7	8	3
New platforms	2	5	8	8
New organisational/legal structures	2	3	10	9
New business models	6	6	7	5

Respect to the former questions we found slightly higher standard deviation in case of self-evaluating answers to the question '**how effective is your business/organisation in managing the following key stages in the social innovation process?'.** The standard deviation was highest in case of proposals, yet, all in all it seems that the majority of the quested Portuguese companies tend to be confident about their social innovation effectiveness (see Table 4).

Table 4: Assessment of effectiveness in managing social innovation

	Totally Disagree	Disagree	Agree	Totally Agree
Prompts (i.e. highlighting the need for social innovation)	2	8	11	3
Proposals (i.e. developing ideas for social innovation)	2	8	13	1
Prototyping (i.e. testing of ideas in practice)	2	4	10	7
Sustaining (i.e. embedding ideas in practice)	2	9	9	4
Scaling (i.e. growing and spreading social innovations)	3	6	11	3
Changing (i.e. altering systems and processes with others)	3	7	9	5

We found that companies and organisations highlighted financial issues as the most important obstacle of social innovation, followed by organisation culture and time management and managerial attitude (see Table 5). '**What barriers do you think businesses/organisations face in implementing social innovation(s)?'**

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Table 5: Barriers to introducing social innovation

Access to information/knowledge	8 (32%)
Access to finance	17 (68%)
Access to appropriate skills in the business	9 (36%)
Access to networks and relationships external to the business	7 (28%)
Time management	12 (48%)
Lack of ideas	4 (16%)
Lack of external business and skills support	7 (28%)
Lack of supportive government regulations and legislation	1 (4%)
Access to supportive managers in the business/organisation	11 (44%)
The culture of the business/organisation does not encourage collaboration	13 (52%)
Other (please specify)	1 (4%)

3.4   Social innovation: Learning and skills development

To the question **'what types of abilities and skills do you think are the most important for managing the key stages in the social innovation process?'** respondents answered by giving the highest number of votes on creative problem solving skills (16), building and using networks (13), and opportunity recognition (12) / resilience (12). On the other hand, self-efficacy and perseverance were found the least demanded skills in this context (Figure 3).

Figure 3: Learning and skills development needs and requirements
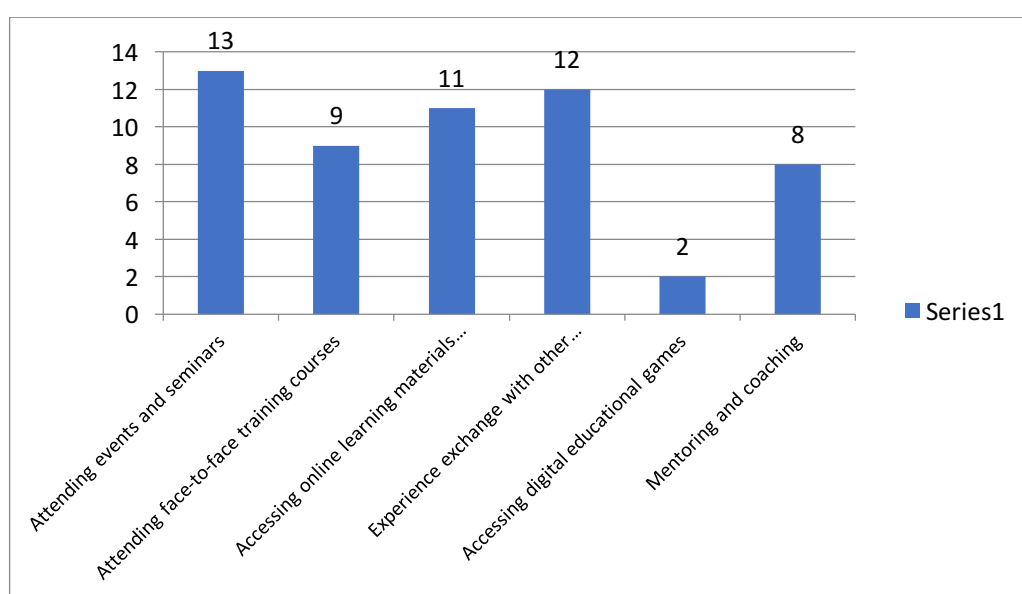
4% of the quested companies/organisations **review their proper strengths and areas for development** in the abilities and skills (to manage the key stages in social innovation) on a

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weekly base, 29% monthly, while quarterly, bi-annually and yearly 17% each. 17% doesn't do such evaluation at all.

What tools do you use to review strengths and areas for development in the abilities and skills needed to manage the key stages in the social innovation process in your business/organisation?

- External team development training
- Brainstorming
- Team meetings, conversation with partners, mentoring
- SWOT analyses (it was mentioned by 3 respondents)
- Various: swot, pest analyses, mind maps
- Internal meetings, preparation of activity plans and active review of them
- Internal meetings
- Satisfaction surveys
- Coaching, training, online information
- Report on activities and accounts and general meetings

Our respondents **acquire the abilities and skills needed to manage the key stages in the social innovation process** through face-to-face events and seminars in the first row, followed by experience exchange, but they also reported online learning as common mean (see Figure 4). Digital educational games haven't been used so far by the majority of them, except 2 respondents (they are startups).

Figure 4: Learning and skills development for social innovation – Preferred methods

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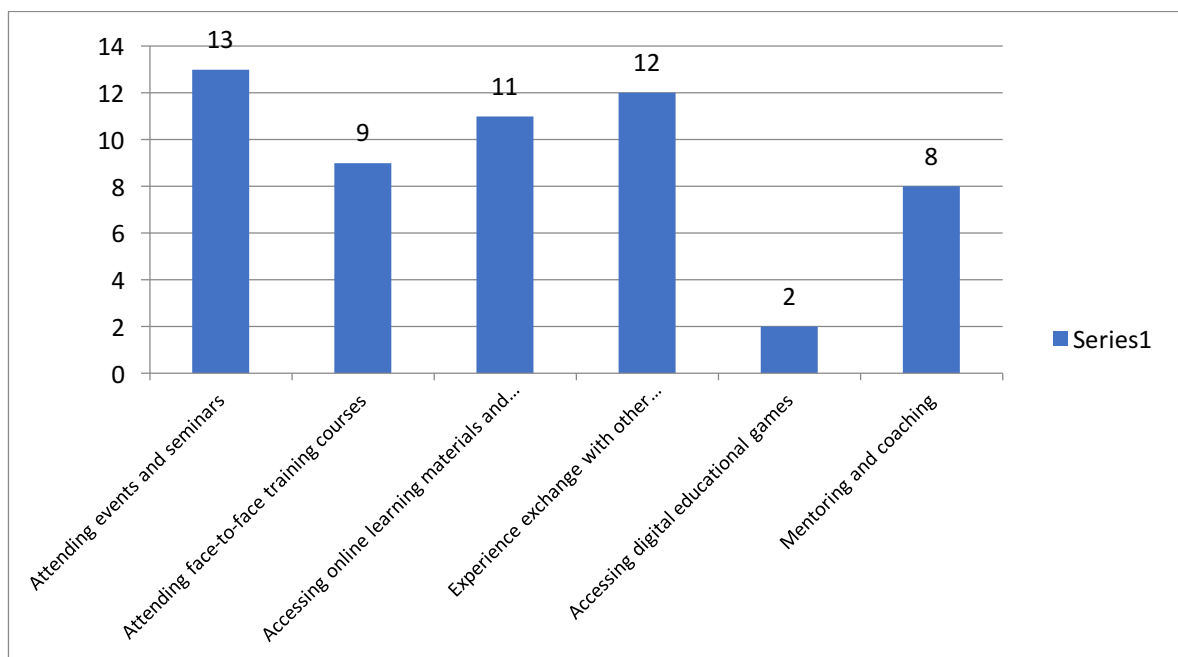
Based on the answers received to the question, **'how useful are the following learning and skills development resources and tools in managing the social innovation process?'** we found that mentoring/coaching, as well as exchanging experiences have the most credit, while there is scepticism towards digital learning games (see Table 6).

Table 6: Learning and skills development for social innovation – Usefulness of different methods

	Totally Disagree	Disagree	Agree	Totally Agree
Attending events and seminars	2	9	12	2
Attending face-to-face training courses	5	4	11	5
Accessing online learning materials and resources (e.g. videos)	1	10	9	5
Experience exchange with other businesses/organisations	0	4	10	10
Accessing digital educational games	7	8	9	1
Mentoring and coaching	2	4	10	9
Other (please specify)	0	3	2	4

The opinion about the below **topics' importance in a learning and training programme** focused on social innovation for businesses is as follows (see Table 7).

Table 7: Learning and skills development for social innovation: Suggested topics

	Totally Disagree	Disagree	Agree	Totally Agree
Social entrepreneurship	2	4	11	7
Creativity	1	5	10	9
Social responsibility	1	4	10	10
Collaboration management	0	4	8	12
Open innovation	0	2	10	11
Diversity management	0	7	12	5
The social economy	0	4	16	4
Networks and relationships	1	2	9	13
Other (please specify)	2	1	3	3

Portuguese respondents found all recommended topics relevant, while networks and relationships of utmost importance, followed by open innovation. Social entrepreneurship and diversity management show bigger controversy in terms of pro and contra opinions.

2 respondents reported to be **aware of the European Innovation Management Standard** on Collaboration Management (CEN/TS 16555-5), 22 haven't heard about it (these companies

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attended our INMA Innovation Training earlier in 2017, where our trainer made reference on the Standard), and one was uncertain.

52% showed further interest in co-operation with the COOP-IN project.

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4. SUMMARY AND IMPLICATIONS

All the companies that we approached can be potential users of COOP-IN's outputs; however many of them represent a realistic target group in the local context (e.g. above mentioned SMEs), while some of them have such cutting edge knowhow and practical experience that they might better serve as reference points and sources of case studies for the fore coming development phases. We could cooperate with Gulbenkian LIS, Lisbon Social Hub, start up ecosystem, etc. to identify practical problem scenarios relating social innovation, that we can further elaborate for simulation games and to formulate problem solving game scenarios.

We had **two face–to-face interviews**, one with the manager of Lisbon Smart City ecosystem and one with one of the founding members and managers of the Lisbon Social Hub. We summarize the key points of the interviews below, as we find their views quite reasonable as conclusions:

- The training material needs to be very-very practical
- There is a high risk of producing a soft and rather theoretical tool, which won't be useful or used
- It should be crystal clear, if we develop the game for the innovation intensive startups or for more classical SMEs. The former group has considerable experience regarding innovation (some even related to social innovation), therefore they would need an advanced level practical material; in case the focus group is the latter, startups can be used as co-creators, their experiences can be taken into consideration and turned into best practices, case studies.
- The organisation structure is very important, our tool can't fit for medium sized bureaucratic companies and micro-companies as well; nor to both NGOs and for profit enterprises.
- The audit tool could be used as the first step of the training process; it could help in the identification of the priorities of the proper organisations, following which, once knowing the self-audited entity's main goals, it can focus on the relating online games (O2) and offline exercises (O3). Later on the self-audit would be repeated or completed as a last step, after the completion of the online and offline trainings.
- The online games should be categorised and grouped based on company priorities. The main possible priorities should be identified – we should think about the most practical reasons why does companies commit with the Coop-in training process?
- The game development should be an open innovation right from the beginning, involving co-creators and collaborators with practical experiences on the field, from the very beginning to the end.

Besides the interviewed expert's opinion we would like to add some more thoughts to conclude the report:
- COOP-IN has an ideal timing; we are supported by the growing interest of companies towards innovation and social responsibility (according to the present marketing and

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branding trends it is becoming not only a value add, but more and more a must that companies need to take into consideration if they want to stay competitive). The overall European legislative/financial framework is supportive (e.g. Innovation Europe initiative, structural funds). Last but not least, the use of gamification and game based learning is a new training strategy that has still a lot to develop, test and to offer; there is a growing interested in digital learning tools both in the academic and corporate HR field.

- The familiarity with game based learning/digital edu-games is still low in Portugal, therefore its credibility is also weak. This aspect will need to be taken care of, e.g. involving academic partners in the testing (impact, effectiveness, etc.). We will need to strengthen the marketing and branding with scientific proofs as well (e.g. study highlights from digital learning related researches).
- Collaboration and networks repeatedly returned as one of social innovations most important aspect in the report; in this sense, it is 'proven' that it make sense to put major focus on the Collaboration Management aspect in the game development (e.g. through the Standard).
- Face-meetings and experience sharing was highlighted as one of the important evaluation and training mean; we need to base and build on this aspect in O3, O4. This can be the driving focus of the offline toolkit. E.g. Bit sized face-to-face training exercises for monthly meetings.
- Coaching and mentoring has major credibility in capacity enhancement. We need to address the toolkit to mentors, and eventually, make sure that the most possible coaching/mentoring professionals know about it – this can be our gate and entry point to the companies and organisations.
- Identifying the development/innovation opportunity was ranked in the top. This aspect should be built in our later product marketing, e.g. Most companies report that the skill to identify innovation opportunities is lacked and needed. This is one.
- Once again, we would like the underline how important it is in our view that the product should be very-very practical, and in order to do so, we need to collect practical examples, cases, and best practices. Basically, continue the work in a collaborative system with the quested companies, and involve them in further field research.

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REFERENCES AND RESOURCES

Interviews and Research carried out in cooperation with Anna Linda Orosz.

https://gulbenkian.pt/en/project/social-investment-laboratory-laboratorio-investimento-social/
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