



D.T2.2.4 Summary report on pilot action in Italy

By Central European Initiative – Executive Secretariat

Innovative Networks

Pilot action implemented in Carnia and Cadore (Italy)

01/10/2018 – 25/10/2019

Reporting date: 13/11/2019

1. Pilot Action Synopsis

Pilot Action Title	From SEs to Community Hubs: territorial capital value and tools & methodologies for Local Development.
Country	Italy
Region	Friuli Venezia Giulia, Veneto
Name of the organisation	Central European Initiative – Executive Secretariat
Contact Person:	Anna Marconato, project manager Gian Matteo Apuzzo, senior expert
Overall Objective	The general objective is to create innovative networks of Social Entrepreneurships SEs in marginal areas with the aim to transform social enterprises in local development actors that can empower local communities.
Purpose	<p>The purpose of SENTINEL’s pilot action in Carnia and Cadore (Italy) is to demonstrate that Social Enterprises - Social Cooperatives in the specific case - can be actor of local development in marginal areas, developing coherent set of interventions that respond to local objectives and needs, in order to promote territorial animation to define the territorial capital value, to activate local communities and stakeholders and to promote the role of SEs.</p> <p>In order to increase the know-how of companies located in marginal areas and to develop specific skills in local development the pilot action will represent the joint initiative of the social cooperatives involved - ATI Cramars and La Cadore. Both of these SEs are very well established in two target areas and as SEs which are giving the social contribution to their communities. In this joint initiative, they will use their internal resources and experience to develop innovative solutions and tools which will define a framework of networking activities oriented towards the local development.</p> <p>Thus, the purpose of the pilot action is to help the enterprises to change their internal and external organisation, to become sustainable businesses which will be capable to contribute to local development.</p> <p>To reach all the objectives the pilot action is divided into 3 actions:</p> <ol style="list-style-type: none"> 1. Mapping of the “territorial capital” including the SEs stakeholders and their role in the targeted territory. 2. Knowledge sharing with the local communities, informing them about territorial capital. 3. Development of a business plan for SEs community hub. <p>The actions will define the community hub, underline the activities and the steps needed to create it, starting from the analysis of SEs in relation to the community needs. The community’s needs and expectations will be assessed through interviews with stakeholders and with the use of innovative indicators.</p>

<p>Expected Results</p>	<p>The main expected result is the implementation of community hubs, places where projects and ideas can be linked with inputs from the community.</p> <p>The two social enterprises develop a new activity/sector which will be oriented to the development of local communities.</p> <p>Moreover, the SEs from the area will improve their entrepreneurial knowledge and will increase networking activities.</p> <p>Training, as well as information and dissemination activities, are fundamental steps towards this transformation for the cooperatives as well as the communities.</p> <p>Relevant expected results are:</p> <ul style="list-style-type: none"> -methodology for community hubs and Creation of Sustainable Networks; -indicators for the territorial capital measurement and creation of different territorial data base; -Development of Local Entrepreneurship opportunities and Business plans on Canvas model.
<p>Key Activities</p>	<p>Reference resource map.</p> <p>Stakeholders identification and interviews (10 in Carnia, 10 in Cadore).</p> <p>Community workshops (2 presentation meetings, 2 workshops for training and informing communities).</p> <p>Toolbox design and comparative analysis.</p> <p>Training event on toolbox application.</p> <p>Inter-cooperative workshops.</p> <p>Definition of a business model (3 business plans).</p>
<p>Key Stakeholders</p>	<p>SEs consortia</p> <p>Regional and local public administrations</p> <p>Education and training organisations</p> <p>Companies</p> <p>Organisations from other marginal areas</p>
<p>Target groups</p>	<p>SEs staff</p> <p>Local Social Enterprises</p> <p>Local Communities</p>
<p>Author of the Report</p>	<p>Gian Matteo Apuzzo, senior expert</p>

2. Executive summary

The report presents the main findings of the pilot action implemented in the Carnia and Cadore mountain areas (Italy) in the framework of the SENTINEL project. The main objective of the pilot action was to define innovative networks to support and to develop social enterprises in marginal areas, with a specific focus on their potential role as actor of local development.

The evaluation of the pilot action has been carried out with different methodologies:

- Desk analysis, with the review of the main project documents and the work plan and reports of the pilot action;
- Direct observation, with the participation in the pilot activities and meetings;
- Qualitative interviews, carried out through interview semi-structured guide with the representatives of the social enterprises involved in the pilot action.

The evaluation has assessed effectiveness and efficiency of the activities regarding general and specific objectives and their related outputs, as defined in the work plan and log-frame of the pilot action concept.

It is necessary to underline that due to the specific pilot action profile, mainly focused on innovative networks and local development activities, naturally led the choice of the dimensions of the evaluation on qualitative aspects, and the quantitative criteria refer only to the achievement of the expected target of the planned activities.

Concerning the main findings, the pilot action achieved the results foreseen in the different phases and some issues can be reported related to last phase.

The first phase of the pilot action was designed in order to make the social enterprise a potential provider of innovation for stakeholders and an actor of local development processes. The main goal was identify the stakeholders and to define the tools to carry out the necessary surveys and data collection. The main activity of the first phase consisted in interviewing the stakeholders' key representatives on their vision about the future of the local community and the role of SEs.

The second phase consisted mainly in developing the tools to analyse and systematise the territorial capital, designing new business plans and setting up a trans-regional network. To sum up the work done, it can be helpful to present quantitative results in the 3 areas of intervention of the work plan.

TRAINING

The training activity evolved into research/analysis activities and consequently passed on to the enterprises during the meetings organised for in-house training:

- 6 meetings took place in Cadore, 2 of which were dedicated to the people responsible for different production areas and 2 focussed on potential new partners;
- 4 meetings took place in Carnia;
- 7 inter-cooperative discussion meetings.

ANIMATION

Local communities animation activities in the two territories were organized in different ways according to the territory involved:

- 20 interviews (10 in Carnia and 10 in Cadore) with representatives of local stakeholders;
- 1 public event in Cadore in order to introduce the pilot action and the service developed;

- 2 public events in Carnia with the local communities (around 100 people);
- 2 events in Carnia specifically targeting local government (municipalities).

SOCIAL ENTERPRISE DEVELOPMENT

The activity resulted in the design of:

- 2 business models for the two cooperatives
 - 1 focused more on local development and social innovation domains
 - 1 focused on new services of SEs;
- 1 business model canvas for a trans-regional and inter-cooperative network.

In the final part of the pilot action, aimed at the building up and strengthening of local partnerships at community level, the two cooperatives faces different issues and decided to follow different paths: Cramars decided to work more at community level, La Cadore to work more at cooperative internal level. These different options led the cooperatives to define different business plans. Anyway the understanding of the encountered issues permitted to draft a joint business plan of the inter-cooperative network more realistic and consistent to local context, to available resources and to potential opportunities.

These Final Evaluation Report will provide SENTINEL partnership with qualitative and quantitative information about the pilot results and findings, assessing efficiency and effectiveness, highlighting strengths and weaknesses, and providing insights and suggestions to the other partners also for the project's follow up.

3. Introduction

The main goal of the SENTINEL's pilot action in Carnia and Cadore (Italy) was to set up and test innovative networks with the purpose to demonstrate that Social Enterprises can be actor of local development in marginal areas, promoting coherent sets of interventions that respond to local objectives and needs, and that are conceived and implemented through local partnerships and with the involvement of local communities.

The problems that the pilot action addressed were defined during the needs' analysis carried out in the first phase of SENTINEL: weak connection between SEs and their territory, the lack of appropriate training opportunities, the lack of entrepreneurial skills, the lack of resources to implement strategic planning and the burn out risk, SEs' weak networking capacity, the marginality and the lack of communication tools and skills.

The aims of the pilot action were the following:

- To create and to manage innovative networks and collaborations in the medium and long term with a view to sustainable local development

- To re-define and to enhance the territorial capital value
- To create networks to re-launch economies in marginal areas
- To increase the know-how of companies located in marginal areas
- To increase awareness of one's own economic and social potential through the use of collected data

The pilot action was based on three main pillars - territorial animation, training and social entrepreneurship development – and the executive plan was composed by three main actions and related measures:

- ACTION 1 – The content: starting from stakeholders, systematize the territorial capital value of the two SEs.
- ACTION 2 – Territorial capital value composition: knowledge sharing and education activities with local communities on territorial capital value and social entrepreneurship
- ACTION 3 – The container: an infrastructure for social entrepreneurship and local development.

In Action 3 two key measure were included: setting up SEs innovative *networks* and defining Canvas Business model.

The key stakeholders for the pilot action purpose and implementation were:

- SEs staff and managers.
- Local social enterprises.
- Local Communities (Cadore, Carnia).
- The regional and local public administrations
- Other mountain and marginal areas communities.

In the evaluation process of the result and impact of the pilot action different methodologies were implemented, to assess both quantitative and qualitative performance. The evaluation has assessed effectiveness and efficiency of the activities regarding general and specific objectives and their related outputs, as defined in the work plan and log-frame of the pilot action concept. Concerning the efficiency, the impact of the pilot action has been evaluated with regard both to internal organisation of involved SEs and external local community development.

It is necessary to underline that the specific pilot action profile, which was focused on innovative networks and local development activities, naturally led the choice of the dimensions of the evaluation on qualitative aspects, and the quantitative criteria refer only to the achievement of the expected target of the planned activities.

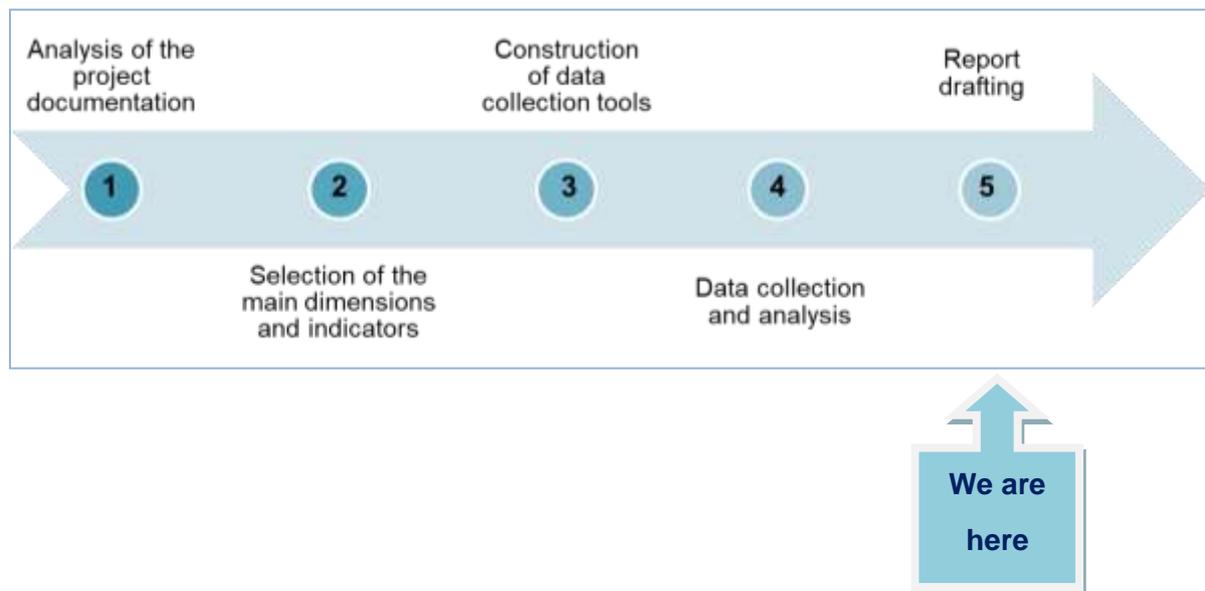
With regard to the objectives of the pilot action, the evaluation focused on the achievement of two main objectives that were “to set up innovative networks of SEs” and “to make SEs actors of local development (community hub)”. The activities that have been evaluated are:

- Animation of local communities, drafting a common method to understand the state of the art of SEs, to involve local communities and to share results with local stakeholders;
- Education and training, drafting a map of resources of mountain areas, defining competence based working processes and related training activities in each social enterprise involved;

- Social enterprises development, with the identification of potential interregional network, the draft of business plans and the identification of new services to strengthen the capacity of SEs to address local needs.

Concerning the methodology, the evaluation has been divided in 5 steps (Fig.1).

Figure 1



For the evaluation of each objective quantitative (project efficiency) and qualitative (project effectiveness) data were collected, with the following specific aims:

- Quantitative data concern the level of achievement of the expected results/outputs and the level of involvement of local stakeholders;
- Qualitative data concern the impact of the project activities mentioned above and the achievement of the outcomes.

The analysis of the project and pilot documentation through desk research (step 1) was used to select the main dimensions (step 2) to evaluate the project's results and impact and to identify the indicators, quantitative and qualitative, most consistent with the project goals. The analysis of the documentation included the Application Form, the pilot concept, the work plan, the log-frame and the main outputs of the pilot action.

An evaluation framework (step 3) was defined to support the data collection that has been carried out through a direct observation and interviews (step 4). The CEI expert participated in different pilot events and meetings (direct observation methods), and most of the information came from the joint meetings of the two social cooperatives involved in the pilot action. Qualitative interviews (through semi-structured interview guide) were carried out with social cooperative representatives and experts. The qualitative evaluation has been enhanced with the inputs on strengths and weaknesses received by the respondents and included in the final report of the pilot action.

The final report of the pilot action (drafted by the SEs involved in the pilot) about the results and findings of the pilot action was designed and carried out also with the aim to support the evaluation process of results and impact of the pilot activities. Data and information provided in the final report presented to CEI-ES represented the main information to evaluate the relevance of the pilot, the efficiency of the pilot, the consistency between the pilot idea and the results achieved, the coherence within the SENTINEL project expected results, the impact for the beneficiaries and the stakeholders.

It is worth to remember the objectives and the planned results of the pilot action that were set in the work plan (linked to the set Measures as in the Pilot Concept document) and that represent the main elements that have been evaluated:

- **OBJECTIVES:**
 - To set up a common methodology through research activities (Measure 1.1).
 - To promote entrepreneurial skills through workshops and training (Measure 1.2).
 - To develop a toolbox (Measure 1.3).
 - To identify and to address the critical issues of marginal areas (Measure 2.1).
 - To inform communities about the potential of territorial capital value and the social entrepreneurship opportunities (Measure 2.2).
 - To identify ideas for entrepreneurial initiatives.

- **EXPECTED RESULTS:**
 - Methodology for community hubs and creation of Sustainable Networks;
 - Toolbox for data base for local development;
 - Development of Local Entrepreneurship opportunities;
 - Training performed and Know-how increased;
 - Increased awareness about SEs role;
 - Business Canvas model.

4. Indicators

	Indicator	Indicator description / comment	Starting situation / number	Ending situation / number
1.	N. of Toolbox for territorial capital	The Atlas of the Mountain		1
2.	N. of interviews with stakeholders	Interviews to representatives of local		20

		organisations form different sectors		
3.	N. of workshops	Public events in the local communities		5
4	N. internal training	Training addressing the staff and managers of the two cooperatives		10
5	N. of inter-cooperative meetings	Joint meeting between Cramars and La Cadore		7
6	N. of business plans	Business Canvas Model		3
7	N. of innovative networks	Inter-cooperative transregional network		1
8				

5. Findings and conclusions

- **Findings**

The results achieved by the two cooperatives (Cramars and La Cadore) at the end of the pilot action are presented below following the objectives set in the pilot executive plan.

The first phase of the pilot action was designed in order to make the social enterprise a potential provider of innovation for stakeholders and an actor of local development processes. The cooperatives started by defining the objectives and the criteria necessary to identify the stakeholders, then tools to carry out the necessary surveys were developed and finally the data gathered with those tools was analysed, focussing on its impact on the two cooperatives. The main activity of the first phase consisted in interviewing the stakeholders' key representatives on their vision about the future of the local community and the role of SEs.

The second phase started after the fair Innovalp 2019, the festival of ideas for the mountains organized in March 2019 by the cooperative Cramars. This second phase consisted in: developing the tools required to analyse and systematise the territory's capital; designing new business plans; jointly analysing the key characteristics of a trans-regional network capable of sustaining and strengthening the social entrepreneurship throughout the development process of peripheral and marginal areas.

The work done, with the timeframe and resources foreseen by the pilot action, produced useful results which will serve as a foundation for future work to be carried out both in the cooperatives and in the territory. The work done also helped to evaluate the different impact on the two types of social cooperative (type "a" and "b") involved in the project.

To sum up the work done, it can be helpful to present quantitative results in the 3 areas of intervention of the work plan.

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Concerning qualitative results, different activities contributes to define them in a continuous process along the pilot implementation.

In light of what resulted from the interviews, the two cooperatives started in-house meetings and discussions leading to some changes in the original work plan of the pilot action: the most important change both cooperatives agreed on concerned the relationship with the local communities.

The three areas critical to strengthening social enterprises and to building a network – training, entertainment on the territory and enterprise – have to be considered as a circle where all the actors involved are interdependent. This circular dimension proved to be rather complex because, especially in mountain and country areas, the necessity to satisfy needs (even basic ones) increases but the resources available (especially human resources) decrease.

Establishing a community hub is the outcome of the ability to organise shared entrepreneurship based on animation and training that in turn require resources and specific skills. During the implementation of the pilot action, vulnerabilities and risks that had already come to light during the focus groups were confirmed: the daily pressures and lack of time available to set out ideas and to

plan new actions, the difficulty in engaging many of the partners/workers, the fear of a negative balance sheet, the complex relationship with Public Administration as the sole client, and practical problems to be tackled. It's in this phase that the differences between the two enterprises became more evident and influenced their respective paths within the pilot action.

One of the main results of the pilot action is a toolbox for the territory capital, which is an instrument to get to know and to analyse in detail the territories where the enterprises operate. The toolbox has a double function:

- to increase the know-how of the enterprise that wants to become the object of local development.
- to understand what the feasible entrepreneurial actions could be, based on the resources available (enterprise capital and territory capital) and on the market.

Cramars decided to analyse not only Carnia, but also the bordering territories to test some assumptions on the overall situation of the mountain areas. A great amount of data was processed and systematised in what nowadays is known as the "Atlas of the mountains of Friuli", available online here: <https://www.coopcramars.it/atlante/>.

The Atlas is a fundamental part of the development strategy of the Cramars Cooperative and at the moment it focuses on six fields of information:

- environment and territory
- population
- education
- economic well-being
- institutions and politics
- labour market

The aim of the Atlas – which will be updated and extended to cover new fields – is to become a tool for work, study, planning and data sharing. It also has the potential to spark innovative ideas and practices focussing on policies for local development.

By the closure of the pilot action Cramars had processed and gathered data relevant to 25 other indicators for every single mountain village. Several organisations have already confirmed their availability to contribute to further develop this tool, also adding a field dedicated to development policies and provisional demographic analyses.

Moreover, from a methodological point of view the Atlas has been conceived to allow the construction of benchmark tools for similar territories of the Italian mountain area. Comparisons involving the areas of Aosta, Sondrio, Belluno, Bolzano and Trento have already started. As far as Friuli Venezia Giulia is concerned, a comparison was made between the former province of Udine and the former province of Pordenone, including their respective mountain areas.

Such a benchmark study is the first fundamental step to start networking throughout different mountain territories.

One of the main difficulties was to gather substantial data from the territory which could be interpreted immediately with reference to the chosen indicators. Moreover the research proved that grouping together villages according to the administrative body (i.e. Province) they belong to, as usually done in surveys, doesn't reflect the real situation of peripheral and marginal territories that have more in common with each other (e.g. the three mountain areas in Friuli Venezia Giulia) rather than with the administrative territory of the Province to which they belong.

As a matter of fact, the needs deriving from two different visions and the complex current situations limited the chances to establish immediate connections between Carnia and Cadore, leading the two social cooperatives to undertake two different paths in the two territories, despite starting from potentially complementary operating conditions. This made it necessary to change the initial idea and brought to light critical issues in establishing an inter-cooperative network on a short timeline. However at the end of the pilot action some potential inter-cooperative collaborations emerged, more accurately reflecting the reality of the situation.

The entrepreneurial idea's (community hub) chance of success is directly proportional to the degree to which the idea is shared, accepted and integrated by the whole group and territory. It is therefore fundamental to support public events (i.e. meetings in the cities) with in-house programmes aiming at clarifying the relationship between the existing activities and the new field of action. The greatest risk is that new tasks might be perceived as an additional burden for those who already manage a high workload. This would generate competition among different sectors and among different territories exactly when cooperation should be a *sine qua non* for the development and sustainability of the new role and services.

The Cadore Cooperative too started the study aiming to collect data concerning Cadore and Val di Zoldo with the same scope investigated in the Friuli Venezia Giulia territory. However when analysing the data gathered to share it in-house, doubts arose about the meaning of such an analysis with respect to the business strategy.

Such an impasse must be contextualised, in order to be understood. The cooperative's target is to create work opportunities for disadvantaged workers. The existence of several sectors, the size of the company (200 workers vs. 12 workers of Cramars) and the economic situation made the in-house discussion lengthier and more complicated. Moreover the cooperative started an internal restructure which monopolised many resources. The Cadore Cooperative currently works with several municipalities. For this reason it is rather difficult for it to share ideas with the above mentioned communities concerning the improvement/management of the services and resources offered (in Cadore there are 22 small municipalities that must guarantee a certain amount of services despite dwindling financial and human resources).

The Cadore Cooperative focused mainly on internal development: strengthening in-house competencies in order to increase cross skills; winning the loyalty of its employees and making them better understand the importance of a cooperative culture and of the role played by its members. The systematisation of the territorial capital carried out with the toolbox resulted premature for La Cadore.

As a matter of fact, the pilot action showed how important it is to link its role as an agent of local development to the work flow of the enterprise, to its competencies, to the improvement of the

services it offers in order to better interact with public bodies and to open itself further to the private market with its social focused targets. This is also why the two cooperatives developed the business plan with two different focus: Cramars focused the business plan on local development and social innovation domains, La Cadore instead focused it on new services provided by the cooperative.

Having in mind this issues that need still to be addressed, it is worth to stress the two main results achieved in the pilot action, that are the “ATLAS of the Mountain” and the “Inter-cooperative Network”.

The Atlas, developed during a nine-month study period, data collection and comparison, has been considered a best practice and useful example on how to increase our knowledge and detect the development needs of the local dimension, especially in areas that are marginal and peripheral. The outcomes emerging from the Atlas highlight the most pressing challenges of these territories: in particular, depopulation and ageing population, less average income, and temporary and seasonal jobs in the most attractive sectors such as tourism are elements which need to be considered when planning future actions to revitalise the mountain areas.

The inter-cooperative network is the first experience with a cross-regional dimension and a business plan (on Business Canvas Model) has been drafted. The tasks that could be performed by the network are: increasing the number of occasions for in-house and inter-territorial debates, enhancing the connections and similarities of the activities/projects; sourcing adequate funding; sourcing and allocating the human and economic resources for in-house training, in order to innovate the know-how and the competencies required.

SWOT analysis of the pilot action

STRENGTHS		WEAKNESSES	
criteria examples Advantages of proposition? Capabilities? Competitive advantages? Resources, Assets, People? Experience, knowledge, data? Innovative aspects? Location and geographical? Price, value, quality? Cultural, attitudinal, behavioural?	Regional legislation on SEs Experience in the local communities Knowledge of local dimension Labour inclusion Cultural attitude Social value Price dimension	Pressure and concentration on daily work Gaps in capabilities Lack of appropriate financial instruments Lack of specific rules in public procurements Communication skills Weak awareness Relation with public administration Fragmentation	criteria examples Disadvantages of proposition? Gaps in capabilities? Reputation, presence and reach? Financials? Own known vulnerabilities? Timescales, deadlines and pressures?
OPPORTUNITIES		THREATS	
criteria examples Market developments? Competitors' vulnerabilities? Technology development and innovation?	National initiative on marginal areas Social innovation Local partnership Transregional collaboration	Political changes Local competition among small villages Scarce resources Digital divide	criteria examples Political effects? Legislative effects? Environmental effects? IT developments? New technologies,

Global influences?	Flexibility to innovation	Internal resistance to change Budget constraints	services, ideas? Sustaining internal capabilities? Obstacles faced? Insurmountable weaknesses? Sustainable financial backing?
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- **Conclusions**

With regard to the analysis and evaluation of the activities carried out based on qualitative and quantitative elements, it can be stated that the pilot action has achieved the expected results; the activities foreseen in the operational plan have been implemented achieving the set objectives and targets:

- a. within the dimension of animation of local communities, the interviews were conducted with representatives of local stakeholders and public meetings in the local communities were organised, with the development of common methods to understand the state of the art of the SEs, to involve local communities and to share results with local stakeholders;
- b. within the dimension of education and training, the training meetings were held, with an analysis and design tool that was the drawing up of a map of the resources of mountain areas; common methods for the definition of work processes based on competences were designed and the related training activities were carried out in each social enterprise involved in the pilot action;
- c. within the dimension of the development of social enterprises, innovative networks and support services have been defined, with the identification of an interregional network, the drawing up of business plans and the identification of new services to strengthen the capacity of social enterprises to satisfy local needs and to act as a local development player.

The activities carried out and the results of the pilot action confirm the achievement of the two main objectives, which were "to establish innovative networks of social enterprises" and "to make the social enterprises actors of local development (community hubs)"; in these two areas of intervention significant differences emerged between the two social cooperatives involved, which had to adapt the work to the internal situation and to the local context, with a re-definition and re-planning, in particular in Cadore, of what was envisaged in the exchange activity with the local community;

The relevance of the pilot action idea can be confirmed, while in terms of feasibility of the pilot action critical issues emerged in the final phase when the involvement of local communities was expected; the two SEs adopted two different solutions: Cramars had only to delay the meetings in the community because in the summer season the resources were all concentrated on high-seasonal work activities and because after the summer could be easier to reach a wider involvement of citizens and local institutions, while La Cadore has faced an internal issue when modelling the strategic plan about its role and they decided to activate a deep internal work before starting the confrontation with the local community; this re-scheduling has led to a delay of almost a month in the end of the pilot action;

In the framework of activities to define a toolbox, a significant tool was developed to increase the know-how in terms of analysis of territorial capital and planning: among the final results one of the most significant products is the 'Atlas of the Mountain', in terms of data collected, of presentation and sharing methods and of interest expressed by other local stakeholders;

Although the two social cooperatives started from a similar starting point, the impact of the pilot action on them is very different, and this is a crucial element to be considered when drafting the

business model for the interregional network; this has an impact also in the relation between the SEs and their related communities, with opposite decision taken: Cramars decided to open itself to the local community being aware that its staff has not yet completely assimilated the transformation from a training organisation to a local development actor, and its decided to invest immediately to improve its external communication and internal training; on the other hand La Cadore decided to strengthen the internal awareness about the role of the SE and it has therefore opted for a communication directed towards its own human capital, and for internal training aimed at redefining and sharing the company mission. The different strategies are currently being discussed between the two cooperatives and this represents a key element to also to define support activities for the start up of the transregional collaboration and the inter-cooperative network.

- **Further steps (Action plan), sustainability and transferability potentials**

The results of the pilot action are a starting point and not an end for the social enterprises involved in SENTINEL project, also because the planned activities and the tools developed have been designed from the beginning in a long-term perspective. The most important contribution coming from SENTINEL pilot action is the methodological approach to define the role of a social enterprise in relation to a vision of local development. This approach gives added value in terms of sustainability and transferability under two main aspects: the first one is that local development by its nature is a dynamic process not limited in time, therefore the activities started during the pilot will be carried out and deepened in the next future; the second one is that the transferability from the areas involved in the pilot to similar territories has already started, in terms of tools for local development and of collaboration between mountain - and marginal - areas.

In particular the next steps and the follow up of the pilot action in Carnia and Cadore can be summarized as follows:

- o the “Atlas of the mountain area” is already considered a strategic tool for the development of the social cooperative Cramars, and therefore it will be developed in the future and other thematic sections will be included; moreover several organizations in the local and regional community have already expressed their interest in using it and deepening it; the Friuli Venezia Giulia Region has expressed interest and willingness to use it, and this has been stated in a joint press conference that was held in the Regional Government premises at the end of the pilot action;
- o The analysis and design approach was considered very useful in a local development perspective, and the work done in FVG region has already moved forward to a comparative analysis of similar territories that will allow SEs and local communities to define a structured collaboration and to set up a network of marginal mountain areas;
- o The trans-regional and inter-co-operative network is the first step for a more formal collaboration and both social cooperatives involved have expressed a willingness to plan further activities and next steps for a joint development.

6. Lessons learned and Recommendations

Based on the evaluation findings of the pilot action carried out in Carnia and Cadore the following can be presented as **lessons learned** that may be applicable in other situations:

1. Given a common methodology, the context analysis is always fundamental because, even in a similar starting situation and with a shared methodological framework and approach, the local features and dynamics can lead to different results;
2. In a process of renewal of the mission and the activities of social enterprises, the internal sharing process should never be neglected, because there may be contrasts between the new strategy and the skills and roles already existing in the company;
3. Trying to define a business dimension with a purpose of social utility, the risk is to forget the mission of social enterprises (i.e. it is not always easy to find the right balance between work inclusion of disadvantaged people and market competitiveness): a comprehensive approach should be kept when planning innovative services and defining business opportunities;
4. The relationship between social enterprises and public administrations is a key element to develop and strengthen SEs in local communities in a situation of ever increasing needs and scarce economic resources;
5. There are still limits in the relationship between social enterprises and local communities because of weak awareness about the role of SEs that must be increased also for a sustainable and inclusive vision of development of local communities;
6. The marginal areas - mountain and rural - despite the depopulation process and the economic crisis still present a great internal competition among small villages, which does not facilitate the construction of a joint vision of development;
7. There are still gaps in the capacity to know the territorial capital: to improve the know-how with the skills of knowing the demographic and economic trends and mapping the resources of a territory is an activity of crucial importance also for consolidated enterprises and organizations that have been working and living in local communities for a long time;
8. By opening themselves to the local communities and promoting discussion and knowledge exchange with local stakeholders and with other territories/communities, the SEs can receive many useful inputs about their mission and in terms of opportunities;
9. Drafting and developing a business plan can be considered also a very useful training exercise for the staff and managers of the SEs;
10. The risk of burn out is hard to be addressed: daily work is always very heavy and it is not easy to find time to plan new activities even when there are external resources available;
11. the start-up phase of a inter-cooperative and transregional network needs to be supported by concrete activities and realistic plans, clarifying very well the benefits that can come from joint work.

Taking into consideration the results of the evaluation, the conclusions and the lesson learned, the following can be reported as **key recommendations**:

1. A key element for the success of social enterprises in marginal areas is the relationship with public administrations, therefore forms of strategic partnership must be found at local level and innovative funding instruments and specific public procurement rules should be defined, that can recognize the social utility of the SEs;
2. The pilot action has shown that training for the development and improvement of competences and skills for innovative activities need dedicated resources; a capacity building program should be launched and specific financial instruments must be defined, with rules suited to the context of marginal and depopulated areas;
3. There is still a knowledge gap about what social enterprises are and what benefits they can bring to local communities; a strategic plan should be developed to support local communities in marginal areas with opportunities for SEs that can combine business and social utility;
4. One of the main activity of an innovative network - transregional or transnational – should be joint communication and promotion of SEs, which often cannot be done by single social enterprises;
5. The Atlas of the mountain, together with the comparative research developed during the pilot action in Carnia, is a very useful tool to increase both the knowledge of single territories and the mutual knowledge among territories; the draft of a joint action plan, which addresses institutions and organisations coming from different marginal areas, is strategic for the development of social enterprises in marginal areas in the participating territories;
6. The ability to develop new ideas and to design strategic plans should be better developed and strengthened in the SEs, as well as the ability to assess the social impact and to evaluate the services and the activities of social enterprises;
7. Transregional (or transnational) and intersectoral networks should be supported, anyway in the start-up phase the priority is to address the need to strengthen the acknowledgement of the role of SEs, to define early concrete activities and to make clear the benefits for the territories and for the organizations involved.