



# DSEtools

Digital Social Economy: building digital tools for social and solidarity economy

**Digital Transition Handbook for the  
Social Economy Umbrella  
Organisations/ Networks**



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## 1. Introduction

### 1.1 About the project

The DSE Tools project aimed at bringing the digital and non-digital actors to enable the digital transition in the SSE organisations. Within this project there were diverse SSE organisations interviewed, including primary cooperatives exploring the potential of digital technologies for improving their usual activities, start-up cooperatives building technologies for data management, and umbrella organisations using digital tools for collaborating among themselves and with their members.

Despite evident knowledge and skills gaps among participants, it generally appeared to us that the SSE movement has reached a certain level of maturity with respect to digital technologies. A similar research was conducted six years ago,<sup>1</sup> in the context of an emerging collaborative economy: back then, SSE organisations were trying to make sense of potential opportunities and threats posed by these new players. Today, using digital platforms is quite common in SSE organisations' usual processes: many SSE workers and volunteers use collaborative solutions both in their professional and personal lives. Obviously, inequalities remain strongly rooted: older SSE volunteers are and feel less capable to use and think about digital technologies than senior developers hired by SSE enterprises. This being said, by creating a panel of participants from diverse backgrounds, generations and genders, we saw that SSE actors are now able to formulate informed and critical opinions about digital solutions and make constructive proposals for a digital vision rooted in SSE values.

The objectives of the project were:

- To create more learning opportunities and upskilling for workers of the SSE who are not trained for the Digital transformation
- To explore deeply the interconnection between SSE and open interoperability standards and raise awareness about the positive social impact they can have.

The main results of the project are:

- the exchange of good practices, to allow mutual learning and upskilling from the cases that were gathered.
- creation of the handbook for proposing practitioners with key steps for designing a SSE data space.
- policy recommendations to build efficient and inclusive data spaces in the SSE.

### 1.2 About the handbook

The handbook is a guide for Social Economy (SE) umbrella organisations who wish to embark on the journey of digital transition by building data spaces. It will give the user the contextual

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<sup>1</sup> [https://coopseurope.coop/news\\_article/vision-paper-released-cooperative-vision-collaborative-economy/](https://coopseurope.coop/news_article/vision-paper-released-cooperative-vision-collaborative-economy/)



background of why such transformation should take place and which factors (internal & external) should be taken into account for the long term objectives.

The handbook contains all the relevant materials needed to take under consideration while planning steps leading to the transformation, as well as other useful information for building the digital skills and the technology that could be applied to the SE sector. It will help to build both the knowledge and skills to start shaping the transition plan and lay the foundation for a successful implementation. The contents of the modules are based on the activities implemented during the DSE Tools project and form the end- result of it.

## 2. Module 1. Social Economy in the Digital Era

### 2.1. Data Spaces for Social Economy

During the project lifespan, it appeared to us that aspirations and challenges met by SSE actors echo the European strategy on data spaces. More specifically, while participants had identified various opportunities of digital solution for the SSE movement, and most of them had already participated in digital transition initiatives (should it be as digital entrepreneurs, or as users of digital technologies), they agreed on one common bottleneck: data silos prevent SSE organisations to efficiently collaborate through data silos. Thus, the second half of the project focused specifically on the data space strategy, and in practice whether and how SSE organisations could position themselves in such a strategy. We also observed that solutions to data silos could hardly be addressed at the level of an organisation. We decided to adopt a higher level, i.e. focusing on SSE umbrella organisations whose roles consist of building collective visions around collective needs, through collective action. This choice was quite innovative, SSE umbrella organisations being rarely considered as key players of digital innovation projects.

The focus groups conducted with major umbrella organisations allowed us to observe that such actors are themselves influenced by a series of factors, hindering their own digital transformation and emergence of a sustainable SSE digital movement. Factors of influence include a mindset shift and leadership, on top of a lack of knowledge about IT solutions.

### 2.2. Interoperable Solutions

To build a successful data space, one needs to use interoperable web solutions. Interoperability is crucial in ensuring that the data stored in the data space can be easily shared and exchanged with other systems and applications. This enables data to be used and reused in a seamless and efficient manner, reducing the time and cost associated with collecting and storing data. Moreover, interoperability in data spaces also promotes innovation and competition by enabling different systems and applications to collaborate and build new services and solutions.



Unfortunately, today's web solutions are not well-suited for building interoperable data spaces. This is because many web solutions are built using proprietary technologies, platforms, and programming languages, making it difficult for them to communicate and exchange data effectively with other systems. Additionally, web solutions often use proprietary APIs and protocols, which are not standardised and therefore not universally compatible. This means that two web solutions, even if they were built with the same technology, may still not be able to communicate and exchange data effectively. Furthermore, there is often a lack of standardisation in terms of the data formats used by web solutions, which makes it difficult for them to understand each other's data.

Web3 technologies, on the other hand, represent an interesting avenue to address the lack of available interoperable solutions. Web3 technologies, such as blockchain and decentralised systems, are built on open and standardised protocols, making them more suitable for building interoperable data spaces. Additionally, web3 technologies also offer greater transparency, security, and control over data, enabling individuals and organisations to manage their data in a more secure and efficient manner. Furthermore, web3 technologies promote collaboration and innovation by enabling different systems and applications to communicate and exchange data in a seamless and efficient manner. As such, web3 technologies offer a promising solution for building interoperable data spaces.

As of today, web3 technologies remain marginal in the overall web market, and even more in the social economy ecosystem. Consequently, existing data-sharing initiatives mainly rely on social economy organisations' capacity to collectively adopt and run one common platform. Initiatives federated under the Platform Cooperativism Consortium highlight a multiplicity of such initiatives, such as CoopCycle and Airbnb in Europe.

In the context of a growing demand for smoother and more systematic data sharing among social economy organisations, and consistently with the European Commission's strategies to address lock-in effects generated by web 2.0 technologies, several social economy players have developed and are marketing their own Web3 technologies. Key examples include the Data Food Consortium and Startin'blox, both based on Solid standards.

The Data Food Consortium is a France-based non-profit organisation developing an agri-food data space for local and organic farmers: its members include Socleo, Open Food France, Elzeard, Alma Food, Mycelium, and Coop Circuits. Data Food Consortium's standards are being promoted and adopted all around Europe, and in North America, with a common objective: easing customers' access and ordering of local organic products, while discharging the farmer with complex and time-consuming data management and duplication processes, and allowing a multiple ecosystem of platforms to develop and thrive depending on local needs and aspirations.

Startin'blox is a multi-stakeholder IT cooperative, also based in France and operating in Europe and North America. It specialises in equipping existing and future data spaces with Web3 ready-to-deploy open source applications, hereby reducing associated costs and efforts. Several social economy data spaces have been experimented and are being established using Startin'blox technologies, such as: Coopedia, a knowledge-sharing hub led by Cooperatives Europe; Space Cooperatives Europe, supporting the digitalization of European start-up incubators in the space industry; and Energie Partagée, a French renewable



energy fund aiming to improve visibility of investments on sustainable energy among local collectives.

Although the availability of Web3 technologies and providers is key, it is not sufficient to enable the emergence of social economy data spaces. As presented in the following section, data spaces require new approaches of change management, conducted at the level of an ecosystem of organisations.

### 3. Module 2. How to make change happen?

#### 3.1 Mindset shift

Mindset shift can be defined as one's ability to adapt thinking patterns, beliefs or orientations when it comes to face a new reality. Digital transformation requires building a *digital mindset*, to adopt digital technologies that could differentiate and add value to organisations and is critical to successful leadership in the digital age<sup>2</sup>. Digital mindset requires a set of attitudes and behaviours that enable people in the organisation to see how data and AI opens new possibilities.

Digital transformation is considered a social change<sup>3</sup>, and therefore it encounters resistance at times. Many will be apprehensive about the unknown ahead. Therefore, the mindset shift also requires a strong digital leadership. Leaders that think critically and look at digital solutions not for the sake of implementing them but how do those fit into organisational culture and how to empower others to learn and develop their own capabilities.

More about leadership you will find in module 2.

During DSE Tools project implementation, we have interviewed leaders of the SE umbrella organisations and it is evident that before laying out the plan for transformation, the organisations need to focus one critical area; pre- transformation step: preparing people for the new digital organisational culture<sup>4</sup>. Further, below the module 1 will take you through its important elements.

Before we embark onto the journey, we found it useful to share some challenges/ barriers that we identified during the interviews and focus group conducted with the SE umbrella organisations with regards to digital transformation:

#### 1. Lack of financial means

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<sup>2</sup> Allen, S.J. (2020). On the cutting edge or the chopping block? Fostering a digital mindset and tech literacy in business management education. *Journal of Management Education*, 44, 362–393

<sup>3</sup> <https://ec.europa.eu/docsroom/documents/53021>

<sup>4</sup> <https://hbr.org/2022/05/developing-a-digital-mindset>



This is the first and utmost reason why SE organisations are lagging behind, when looking at deployment of the technology on a day - to - day basis. However, not transforming can cost even more in the long-term. Here the organisations must look beyond immediate results and invest in the long-term growth. Deloitte in their survey estimated <sup>5</sup> the average SME devotes more than 50% of the budget to maintenance, and only 19 percent is allocated for innovation. The introduction of the technology does not need to be radical. The organisation can start from small innovations, technologies, that will steadily lead to increase efficiencies, grow services for your end- beneficiaries and streamline workflows.

## **2. General lack of understanding of the power of digital transition**

Below few identified reasons:

- **Resistance to Change:** Many organisations have established processes, systems, and ways of working that have been in place for a long time. This makes it difficult to adopt new technologies and digital tools that require changes to the existing systems and processes. There may also be a resistance to change among employees who are comfortable with the current way of working and may not see the need for digital transformation.
- **Lack of Awareness:** Some organisations may not be aware of the potential benefits of digital transformation, or they may not fully understand how digital technologies can help them achieve their goals. This can be due to a lack of knowledge or expertise in the field of digital technology.
- **Fear of the Unknown:** Digital transformation can be daunting, and some organisations may be hesitant to embark on this journey due to a fear of the unknown. They may not know where to start, what technologies to adopt, or how to manage the change process.

## **3. Lack of change management skills at the leadership level**

Digital transformation requires strong leadership and a clear vision for the future. Some organisations may not have the leadership or vision necessary to drive digital transformation and may not fully understand its potential benefits. Many leaders are trained in traditional management techniques, which do not necessarily emphasise change management skills. Therefore, they may not have the necessary knowledge and skills to effectively manage change within their organisations. This also has to do with leaders who may be resistant to change themselves, which can make it difficult for them to lead change initiatives within their organisations. This can be due to fear of the unknown, comfort with the status quo, or a lack of understanding of the potential benefits of change. Lastly, In many organisations limited resources hinder change management. Some of the organisations may not be able to invest in change management training and resources for their staff.

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<sup>5</sup> <https://securityintelligence.com/articles/digital-transformation-balancing-speed-security-innovation-cybersecurity/>



## 3.2 Change Management

**When:** it takes place before acquiring digital skills or introducing technological solutions.

**Aim:** to assess how employees feel about digital transformation

Change management is a general term for the change of strategic direction of the organisation. It is a disruptive activity which can result from a whole range of different reasons: such as i.e. new technology. Change management is drawing the plan of how it will be implemented (building blocks). It is the process that must result in improvements in the given sphere/ area that the organisation is focused on. In other words: it has to be designed with the view of improving results. The impact of that process will have a great influence on the future direction of the organisation.

### 2.2.1 Building blocks for change management

#### Preparations

a) Awareness raising campaign (internal)

Launch an internal awareness-raising campaign to help people understand the benefits of digital technology in their daily work. The awareness raising should also focus on why digital transformation is important for the future of the organisation and its ecosystem growth.

It aims at:

- engaging people who do not see the value of gaining digital competences
- putting emphasis on why digital transformation is critical for the organisation

b) Building confidence

The confidence grows when people start to share their experiences. Story sharing with peers will boost the confidence of individuals and encourage others to explore how digital solutions can help in achieving their goals at work.

c) Change as a constant process

Digital tools are constantly changing and improving. Prepare the employees that change in the digital world is constant and there is no end point. It requires continuous adaptability, instability and a degree of dynamism among the team.

#### Vision of change

Executing the change requires a plan. Leaders must draw a clear plan that will lead step by step the team to a desired outcome.

4 general elements that should be embraced into planning <sup>6</sup>:

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<sup>6</sup> <https://online.hbs.edu/blog/post/change-management-process>



- Setting up strategic goals
- Identify KPIs
- Set the team to oversee the process
- Set a project scope

Please see Annex 3 for the templates.

### **Implement the change**

It largely depends on the scope of the project. As one of the activities that help the organisation to pace out the change could be mapping the benefits of technological solutions in delivering services of the organisation:

- Identify the main services.
- Identify the target group per each service to assess the capacity of adapting to a new service delivery.
- Identify which digital solution can help you to improve the service.

Implementation of the change will require to introduce agility- executing decisions in a timely and adaptive way, respecting organisational culture.

While preparing for the Implementation of the change we need to look at the organisation's stakeholders:

- Identify who are your stakeholders (decision -makers that impact the decision process at your organisation and have different interest in the performance of the organisation)

Examples of the potential stakeholders:

- employees, management, board members, governments, international institutions, funding bodies, competitors, communities etc.
- Identify what is their engagement in your organisation

Example:

- Employees: execute the initiatives and implement the decision of the management.
- Communities: expect that your organisations initiatives have positive impact on the communities

Please see *Annex 1* for the template of above activities.

At this stage, your organisation will have a clear overview of the potential services or initiatives where digital transition may affect/ improve or radically change. Further, you will also have a map of stakeholders involved in such change, and who would be the most affected by it, and what are the benefits for each of the group.



The next steps require planning and a fundamental choice of how and what initiative(s) is relevant for your organisation.

Develop a comprehensive plan that outlines:

- approach
- timeline
- roles and responsibilities
- communication plan
- training and support needed

Important: make sure that the implementation is at the small scale (remember it is a pilot initiative).

There are few aspects that could help to build the right environment for the implementation:

### **1. Create a continuous learning programme**

Organise training sessions to familiarise your staff with the new tools. Make sure that the training is at an adequate level.

Organise the peer to peer relationships, where employees who are more tech-savvy could help those less advanced.

### **2. Create a continuous performance review**

Organise a feedback loop, where you will receive information about: how they interact with use of the new tools and how those tools help them attain better performance at work.

### **3. Partner with another organisation or tech supplier that might help you in implementing the new tool.**

While planning the initiative, look for a potential partner that can help you in the implementation phase. This could be a supplier of the new tool or learning institution that provides adequate training. Joint forces might turn out beneficial for both parties.

## **Review the process**

Once the pilot initiative is implemented, there is a need to review the process. Below please find the example questions that should be taken under consideration while reviewing the process:

- What is the improvement of the operational side of the organisation due to change? Is the team more productive?
- Has there been any reduced costs?
- Has the efficiency improved due to technology introduced?
- Is there an improvement of financial metrics? (less costs related to maintenance?)
- Is there improvement of the strategic metrics? (what do beneficiaries want, what is the comparative position in the sector/ ecosystem the organisation is operating in).

## **Embed changes within the culture and practices**



Introducing the change is not easy, let alone making the change a part of the organisation's culture. The Social Economy umbrella organisation structure poses challenges due to its complexity. The change will affect the members, partners and collaborators and the success of it depends to what extent those stakeholders embrace it.

Below are a few steps that might help you to navigate important elements while making the change successful long term and sustainable.

**Lead by example:** Leaders and managers need to lead by example and demonstrate the desired behaviour in order to model the new culture and practices for others to follow.

**Engage stakeholders:** Seek their input, listen to their concerns and ideas, and involve them in decision-making. This will help them feel invested in the change and more likely to support it.

**Provide training and resources:** this will allow the team members to learn new skills and adapt to the change. This could include workshops, online training and mentoring.

**Reinforce the change:** Celebrate milestones and successes along the way.

**Monitor progress:** adjust the approach as needed. Regularly review the change and its impact on the organisation. Make adjustments and improvements where necessary to ensure the change is sustainable.

### 3.3 Embracing Digital Technologies (DTs) into Open Innovation process (OI)

Open Innovation (OI) has been put on the fast pace thanks to digitalisation. This concerns new ways of interactions, knowledge sharing and access to the data and a much faster analysis of data, thanks to artificial intelligence (AI). Specifically, OI explores and exploits flows of knowledge which come from outside the organisation's operating environment, including social communities, start-up ecosystems and many other sources<sup>7</sup>.

How to make sure that we embrace its full potential, and where to start? In order to foster OI, one of the most important elements is to embrace collaboration and new working culture. OI creates an environment to easily break down the silos and opens up the organisations to more collaborative and open ways of working. The use of disruptive digital technologies also triggers new approaches to the stakeholders' management.

Below you will find some of the examples of DTs that harness the advantage of OI.

- Open Innovation equals open collaboration: use of **open-source software**. Open system allowing third parties to use open platforms, no restrictions in participation or usage and available data to all stakeholders. Big Data integration helps to create transparency and helps in designing more efficient processes that improve performance.
- **Crowdsourcing**, the project finance can be crowdsourced through public crowdfunding platforms.

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<sup>7</sup> Chesbrough, 2017, p. 35

- Use of **digital services or web-based software tools** (from aligning the appointments, to collaboratively working or exchanging the documents, to collaborative sharing, documenting and communicating).
- **Cloud computing**: internet- based, based on demand and subscription (Azure, Google, Microsoft etc).
- **Social media**: allows organisations to analyse the trends through data-driven platforms, reduces costs of research (tests concepts, surveys, questionnaires etc) and gives access to members/ partners and collaborators base.

## Open Innovation Process Framework

There are many ways to design OI processes and each organisation might have a set of different approaches, however there has been a variety of frameworks developed that could help identify its main elements and blocks of subsequent activities.

Our choice of putting forward the Chesbrough<sup>8</sup> framework was intentional, as he defines Open Innovation as "the use of purposive inflows and outflows of knowledge to accelerate internal innovation, and expand the markets for external use of innovation, respectively."<sup>9</sup> In other words, the Open Innovation process combines ideas and knowledge internal and external to the organisation. Consequently, he proposes a new model for Open Innovation that consists of three key stages:

- **define** activities are related to identifying strategic arenas of focus, members' needs, areas of business opportunity, service ideas, concept evaluation, budget planning, and process planning.
- **design** development of the service/product, design, testing and planning
- **validate** test, planning launch, measurement, review.

Certainly, the framework as it is presented in its original form<sup>10</sup> relates more to SMEs that are more adaptable, flexible and have less governance barriers, however, we found it as an useful exercise to try and adapt it to SE umbrella organisations.

In the figure below, we are proposing the framework reconfigured to meet the needs of SEs umbrella organisations.

Such a framework can provide a well-defined understanding of different activities within the IO process linked to the characteristics of DTs, that will help manage the process. This can also help to define the role of different DTs across all the stages of the IO process. This is just an example with general indicators of activities.

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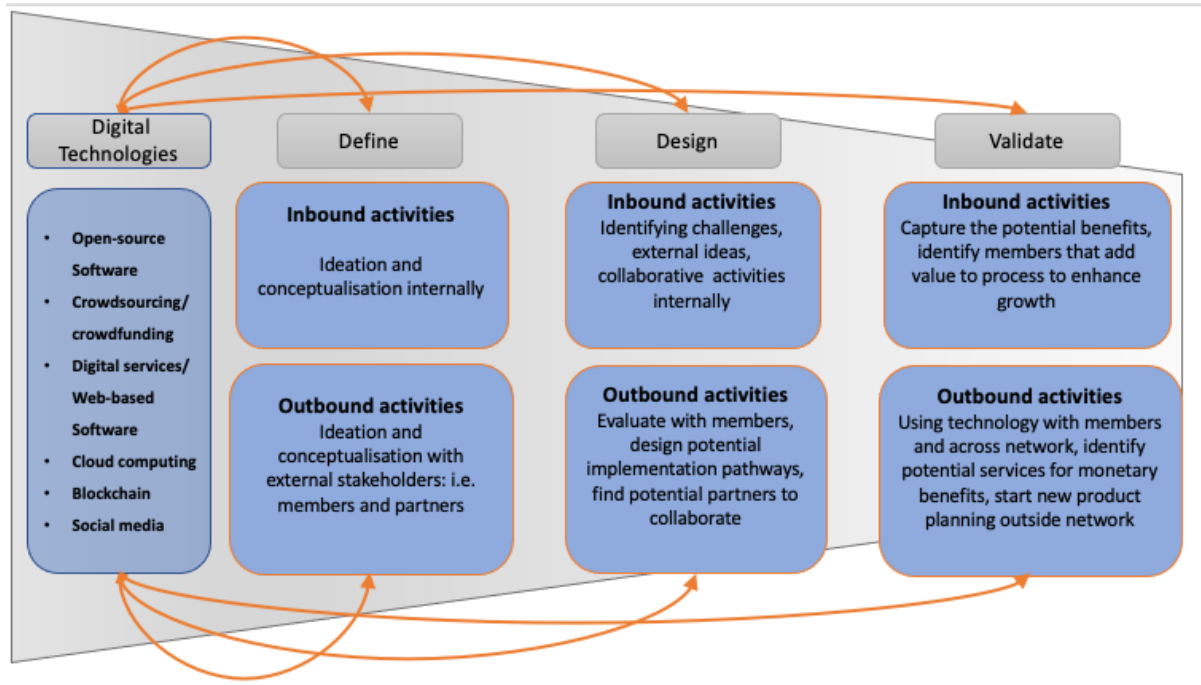
<sup>8</sup> Chesbrough has been attributed with coining the term Open Innovation but has not been attributed with discovering the method. (Giannopoulou, Ystrom, Ollila, Fredberg, & Elmquist, 2010).

<sup>9</sup> E. Vin Hipel, 2005; *Democratising innovation: The evolving phenomenon of user innovation*.

<sup>10</sup> P.J. Barlatier, A.L. Mention & A.Misra, Managing Digital Open Innovation Chapter 1: The Interplay of Digital Technologies and the Open, Figure 1: Integrated framework showing the influence of DTs on the stages of the OI processes ( page 18)

[https://www.researchgate.net/publication/341573606\\_The\\_Interplay\\_of\\_Digital\\_Technologies\\_and\\_the\\_Open\\_Innovation\\_Process\\_Benefits\\_and\\_Challenges](https://www.researchgate.net/publication/341573606_The_Interplay_of_Digital_Technologies_and_the_Open_Innovation_Process_Benefits_and_Challenges)

However, in the *Annex 2*, you can find a blank template to adjust and play with the DTs according to your organisational and ecosystemic reality.



Open Innovation is considered an essential factor for maintaining competitiveness and ultimately the survival of an organisation. The ongoing transformation should be supported through learning, self-reflection, competence development, self-reflection and leadership. Through developing agility, and a step-by-step process, accompanied by acquired skills and reviewed leadership, the understanding of change of the culture is developed along the way the IO process, that ultimately drives digital transformation.

Further, innovation no longer takes place within the boundaries of a single organisation. It **tends to be distributed among many stakeholders, interacting in a network**. The above framework of Chesbrough challenges the traditional model of vertical integration and introduces a distributed perspective on the innovation process.<sup>11</sup>

<sup>11</sup> G.Gabison, A.Pesole (2014), JRC; An Overview of Models of Distributed Innovation: Open Innovation, User Innovation and Social Innovation

## 4. Module 3. Leadership

Leadership is a critical element in driving the emergence of social economy data spaces, and this is especially true for SE umbrella organisations. These organisations face unique challenges in promoting the social and environmental objectives of the social economy while also ensuring financial sustainability and operational effectiveness. Effective leadership is essential for navigating these complex issues and for inspiring and motivating staff, members, and stakeholders to work towards building and contributing to social economy data spaces.

In today's rapidly changing digital landscape, leadership in social economy umbrella organisations requires a particular set of skills and approaches that can facilitate the building and contribution to social economy data spaces. Leaders must be adaptable, able to navigate uncertainty and complexity, and able to embrace new technologies and digital tools to support their work. They must also be committed to transparency, collaboration, and participatory decision-making, engaging with members and stakeholders to ensure that their needs and perspectives are represented in the organisation's activities related to social economy data spaces.

In this section, we will explore the key elements of effective leadership in social economy umbrella organisations, including strategies for promoting the building and contribution to social economy data spaces, building strong relationships with stakeholders to facilitate data sharing, and fostering a culture of continuous learning and development to keep up with the rapid pace of technological change.

### 4.1. Social economy umbrella organisations and data spaces: who is the leader?

Traditionally, leadership in organisations has been viewed as a top-down, centralised process, with the head of an organisation holding the power and legitimacy to implement change. However, when it comes to building and contributing to data spaces within the context of social economy umbrella organisations, this hierarchical approach may not be effective. Unlike in a single organisation, there is no one person at the umbrella organisation level who has the capacity and legitimacy to design and implement change unilaterally. Rather, engaging members at all levels is essential to both envisioning and implementing change.

Therefore, we propose to adopt a distributed leadership approach, which has been widely used in fields such as education and inter-organizational information systems. This approach suggests that roles and responsibilities for a project can be distributed among a community, for instance among employees from different organisations. In the context of a data space project, a distributed leadership approach means that participant organisations will collectively build a common vision, distribute roles based on their interests and internal resources, and assume related responsibilities to ensure the emergence and sustainability of their data space.

Distributed leadership relies on two dimensions: a collaborative structure and collaborative practices. A social economy umbrella organisation can provide a relevant framework to offer a collaborative structure and govern collaborative practices. Such an organisation can help facilitate the collective decision-making necessary to build and contribute to a data space,



while also ensuring that the diverse needs and perspectives of member organisations are taken into account.

In the following subsections, we explore two actions that umbrella organisations can take to create the internal and external conditions to enable their members in adopting a distributed leadership posture leading them to establish a data space.

#### 4.2. Creating space for distributed leadership within your umbrella organisation

Social economy umbrella organisations are typically heterarchical, horizontal frameworks of collaboration. They are controlled and governed by their members, who are themselves social economy (umbrella) organisations. Such heterarchical structures may be very relevant to build data spaces, which are also aimed to be heterarchical frameworks of collaboration, characterised by collective governance and preservation of each organisation's autonomy.

However, despite the potential advantages of heterarchical structures, any umbrella organisation's structure might not be initially adapted to enable the emergence of distributed leadership dynamics among members leading to the emergence of a data space. Typically, the structure of some umbrella organisation might be primarily aimed at collecting information from their members and compiling it into lobbying messages – activities which involve little or no horizontal, operational collaboration among their members. To overcome this challenge, umbrella organisations may need to create internally adapted frameworks that enable their members to collectively build a data space through distributed leadership.

Creating space for distributed leadership involves giving more autonomy and decision-making power to members, so they can actively participate in building and governing the data space. This requires a shift in leadership mindset from centralised to distributed, where the focus is on empowering members to become leaders in their own right.

##### Stimulating the emergence of leadership activities

To enable distributed leadership, umbrella organisations need to conduct activities that provide their members with the necessary tools and resources to become active participants in the data space project. These activities can include workshops aimed at elaborating a collective vision backed with specific objectives, identifying leaders and resources activatable among member organisations, and co-building a collective roadmap.

In the longer run, umbrella organisations should stay present in facilitating and supporting the data space all along its life. This may involve appointing dedicated resources for facilitating discussions and communicating around the project advancement, organising regular meetings and training sessions to ensure members have the necessary skills and knowledge to contribute to the project effectively, and providing ongoing support to ensure the data space remains relevant and valuable.

Last but not least, the umbrella organisation should also specify its own contribution to the project. For instance, by envisioning how it could benefit from a data space, what will be its role, and which resources it can commit to make this data space emerge and sustain, under which conditions. A business model for the data space, putting the umbrella organisation at



its centre, may be relevant. This will help to ensure that the data space aligns with the umbrella organisation's strategic goals and provides tangible benefits to its members.

In summary, creating space for distributed leadership within social economy umbrella organisations requires ongoing commitment to providing members with the necessary tools, resources, and support to contribute to the data space project. By facilitating the development of a shared vision, identifying leaders and resources, and co-building a collective roadmap, umbrella organisations can empower their members to become active participants in the project. Additionally, the umbrella organisation should specify its own contribution to the project and envision a business model that puts the organisation at the centre of the data space.

### Providing a safe governance space for such leadership activities

Umbrella organisations should establish an appropriate governance framework dedicated to building and governing data spaces, cultivating a culture of trust and openness, where members feel comfortable sharing their ideas and opinions, and where feedback is valued and acted upon. This governance framework should ensure that the project benefits from operational guidance and working groups can be established to involve operational staff with dedicated roles specific to this project, such as chairing the working group, ensuring that the working group follows operational roadmaps, or even establishing an ad hoc financing system.

It is important to note that this specific governance can fundamentally differ from the umbrella organisation's usual governance. It can be restricted to a smaller number of members and involve organisations that are not members of the umbrella organisation, such as local innovators. Its decision-making processes can also differ, such as using majority vote rather than consensus-based, or vice versa. Creating a separate governance structure for the data space project can help to ensure that it is run efficiently and effectively, with clear decision-making processes that align with the project's goals.

Establishing a culture of trust and openness within the governance framework can foster a sense of ownership and commitment among members, leading to greater engagement and participation in building and governing the data space. This can be achieved by creating opportunities for members to provide feedback and suggestions, encouraging open and honest communication, and valuing and acting upon the feedback provided. By doing so, umbrella organisations can create an environment where members feel empowered to contribute to the project and take ownership of its success.

### Combining data space operational objectives with long-run strategies

When establishing activities and governance frameworks for stimulating distributed leadership in a data space project, it is important to consider the long-term impact on both the data space and the umbrella organisation as a whole. The governance framework and roles adopted within the project will likely shape the future of the data space and must be established early on, including decisions around the type of collaborative structure, resource control, and agreed-upon rules.



In addition to the data space project, the umbrella organisation must ensure that the governance structure is connected to the larger existing governance structure. This will be critical in sustaining the data space over time. Key members of the umbrella organisation should be engaged operationally in the data space project, and the general assembly should have a say in the data space's activities while preserving operational efficiency. By considering both the data space project and the umbrella organisation as a whole, distributed leadership can be fostered while ensuring the success and sustainability of the data space.

#### 4.3. Establishing a level-playing field for leadership at the organisation's level

In the previous subsections, we saw that an umbrella organisation can create a level-playing field to support the emergence of a collective project conducted in partnership with its members. Yet, each member organisation may have different abilities to seize the opportunity offered by such collective frameworks. Level-playing fields for leadership should thus also be created at the level of individual organisations.

Individual leadership does not necessarily mean self-leadership. Individuals, who make a part of the collective are characterised with skills to surround themselves with the network of people that support each other and make choices that are of the best interest of the collective and others. The collective is the mix of individuals that form a force constructed of various personalities and leadership traits or behaviours. According to Professor Stijn Viaene,<sup>12</sup> a successful digital transformation requires leadership that can detect opportunities and mobilise people and ideas to make the most of them. To achieve this, his team has developed a leadership model called the Digital Leadership Model or 4V model. This model distinguishes between four types of leadership: vigilant, voyager, visionary, and vested.

Vigilant leaders scan the environment, looking for ideas and opportunities beyond the boundaries of their organisation or sector. Voyager leaders tap into the creativity of individuals and teams, turning abstract opportunities into concrete solutions through experimentation. Visionary leaders paint a convincing and ambitious picture of a successful digital company, ensuring everyone in the organisation feels like they are striving towards a common goal. Finally, vested leaders put the entire organisation on the path to successful digital transformation, like a well-oiled machine.

It's important to note that the Digital Leadership Model defines a specific type of leadership as a set of behaviours, rather than personality styles. Therefore, each type of leadership stems from close collaboration between a group of people who are spread across the organisation. It's unlikely that one person can embody all four types of leadership, but it's possible to be good at more than one role.

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<sup>12</sup> <https://www.vlerick.com/en/insights/how-different-types-of-leadership-contribute-to-the-success-of-your-digital-transformation/>

Creating level-playing fields for leadership at the individual organisational level can help organisations identify which types of leadership they need to cultivate or recruit to succeed in their digital transformation.

By understanding the Digital Leadership Model, translating it into their own context, and aligning it with their distributed leadership vision, organisations can profile themselves and their colleagues as one or more of the four types of leadership and enter into coalitions that can make the most of the opportunities presented by digital transformation.

## 5. Module 4. Digital Skills

### 5.1. Digital Competence Framework for Citizens: DigComp

First version of DigComp was launched in 2013, with the aim to provide common understanding and measuring digital competences. Since then it has been updated several times, following the emergence of new technologies; such as Artificial Technology or Augmented Reality. There are multiple purposes of the framework, but most of all it is a tool to improve “EU Citizens digital literacy”. It is widely used for training, educational purposes, assessment tools , for targeted groups in the diverse industry sectors. DigComp might help as well within organisations to identify digital profiles that are relevant to the sector they operate in.

#### a) A snapshot of the DigComp Structure:

DigComp<sup>13</sup> is divided into 5 main competence’ areas such as:

- Information and data literacy:
- Communication and collaboration
- Digital content creation
- Safety
- Problem solving

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<sup>13</sup> <https://publications.jrc.ec.europa.eu/repository/handle/JRC128415>





Each area looks at the competences that can refer to specific activities and usage. The area 4 and 5 (Safety and Problem solving) are “transversal”, as they apply to any type of activity carried out.

<b>Information and data literacy</b>	<b>Communication and collaboration</b>	<b>Digital content creation</b>	<b>Safety</b>	<b>Problem solving</b>
<p>To articulate information needs, to locate and retrieve digital data, information and content.</p> <p>To judge the relevance of the source and its content.</p> <p>To store, manage, and organise digital data, information and content.</p>	<p>To interact, communicate and collaborate through digital technologies while being aware of cultural and generational diversity.</p> <p>To participate in society through public and private digital services and participatory citizenship.</p> <p>To manage one's digital presence, identity and reputation.</p>	<p>To create and edit digital content.</p> <p>To improve and integrate information and content into an existing body of knowledge while understanding how copyright and licences are to be applied.</p> <p>To know how to give understandable instructions for a computer system.</p>	<p>To protect devices, content, personal data and privacy in digital environments.</p> <p>To protect physical and psychological health, and to be aware of digital technologies for social well-being and social inclusion.</p> <p>To be aware of the environmental impact of digital technologies and their use.</p>	<p>To identify needs and problems, and to resolve conceptual problems and problem situations in digital environments.</p> <p>To use digital tools to innovate processes and products.</p> <p>To keep up-to-date with the digital evolution.</p>

Source: The Digital Competence Framework for Citizens - With new examples of knowledge, skills and attitudes

Each competence area is built in the frame of 5 dimensions to navigate the competences and dive deeper into specifics of each of the competences:

- Dimension 1: Competence area
- Dimension 2: Description of the specific Competence
- Dimension 3: Proficiency level
- Dimension 4: Examples of knowledge, skills and attitudes
- Dimension 5: Uses cases

Dimensions 3 will take the user through indicators to identify a level of proficiency in the specific competence. It helps users to preliminary assess the level of knowledge within the competence. Guiding questions are formulated in an easy way to verify what “I can...”

Dimension 4 will give the overview of knowledge, skills and attitudes that are needed to reach proficiency level.

Dimension 5 looks at the link between the use case and its proficiency. It shows users the example of employment scenarios and learning scenarios in concrete levels of proficiency.

#### **b) Why DigComp is useful:**

DigComp competence framework aims to help understand the key competences to then apply and tailor it to the specific sector or profession. It gives guidelines and should not be used as a key assessment tool.

It could be used by organisations as **(STEP 1)**:

- a first attempt to map out the areas of skills for upskilling or re-skilling their employers.
- a reference point to identify the digital competences' gaps for the entire industrial ecosystem that the organisation operates in.

Further, **(STEP 2)**, the DigComp refers the user to the concrete tools that serve as:

1. Tools for Self - Reflection, monitoring and certification of digital competence:
  - [Self-assessment tool on Digital Skills and Jobs Platform](#)
  - [DigCompSat](#)
  - [MyDigiSkills](#)
2. Reports and guides for DigComp implementation
  - DigComp into Action: Get inspired, make it happen
  - DigComp at work
  - DigComp at Work Implementation Guide

Above guides will give support in the implementation of the DigComp framework and inspiring practices related to employability, education or defining competence for specific jobs.

As as **STEP 3** , the [Digcomp Community of Practice](#) could be of help to:

- connect with other stakeholders (individuals or organisations) who are actively using the framework
- hosts discussions launched by members or moderators on various topics
- share resources on specific aspects (e.g. digital literacy initiatives and materials in developing countries)
- view the repository of DigComp reference documents,
- offers webinars where CoP members and other stakeholders present the DigComp-related activities

## 5.2. Overview of the relevant competences for effective transition of SE umbrella organisations (practical exercise)

Based on the interviews that were conducted within the frame of the DSE TOOLS with the SE umbrella organisations, we have selected below the competencies that are the transversal and the most relevant to SE umbrella organisations, considering the nature of their role and the governance structure.

Following the [DigComp Framework](#) assess the level of your proficiency in the following competence areas.

### **Competence Area: Information and Data Literacy**

Check your proficiency level within the organisation how do you **manage data and information**:

- a) organise, store and retrieve data, information in digital environments.
- b) organise and process them in a structured environment.

Look at the knowledge, skills and attitudes and mark how many of them you are able to gather under this specific competence.

### **Competence Area: Communication & Collaboration**

Check your proficiency level within the organisation how do you:

- a) interacting through Digital Technologies and to understand appropriate digital communication means for a given context
- b) Share data, information and digital content with others through appropriate digital technologies
- c) act as an intermediary, to know about referencing and attribution practices.
- d) use digital tools and technologies for collaborative processes, and for co-construction and co-creation of data, resources and knowledge.

Give to each of the competence above at least one example of the practice you exercise at your organisation.

### **Competence Area: Safety**

Check your proficiency level on safety, particularly how do you:

- a) protect devices and digital content
- b) understand risks and threats in digital environments
- c) make sure that safety and security measures are in place and have a due regard to reliability and privacy
- d) protect personal data and privacy in digital environments

Give to each of the competence above at least one example of a practice you exercise at your organisation.

if you understand how:

- a) to use and share personally identifiable information while being able to protect oneself and others from damages.
- b) that digital services use a “Privacy policy”



- c) to inform how personal data is used.

Explain, in short, each above item.

### **Competence Area: Problem Solving**

Check your proficiency within the problem-solving area, particularly how do you:

- a) assess needs and to identify, evaluate, select and use digital tools and possible technological responses and to solve them.
- b) adjust and customise digital environments to personal needs (e.g. accessibility).
- c) use digital tools and technologies to create knowledge and to innovate processes and products.
- d) engage individually and collectively in cognitive processing to understand and resolve conceptual problems and problem situations in digital environments.

Give to each of the competence above at least one example of a practice your exercise at your organisation.

If you understand:

- a) where one's own digital competence needs to be improved or updated.
- b) how to support others with their digital competence development.
- c) how to seek opportunities for self-development and to keep up to date with the digital evolution.

Explain how you understand each of the above items in the context of your organisation.

## 6. Conclusions

The aim of this Handbook was to provide the SE umbrella organisations with the guidance and the background knowledge to begin their journey of Digital Transformation. Although you may have reached the end of the book, the activities and information are guaranteed to continue to support your work in the future. As you continue to grow, there may be ideas from this book you use or share with your colleagues around you. By carrying on your journey, using the tips and knowledge gained, and sharing it with others along the way, you can support other colleagues and contribute to the success of your organisation in pursuing digital transition.

Further support and information can be found through these channels:

Website: <https://www.diesis.coop/projects/dsetools/>

Facebook: *Diesis Network*

Twitter: *@Diesiseu*



# ANNEX 1

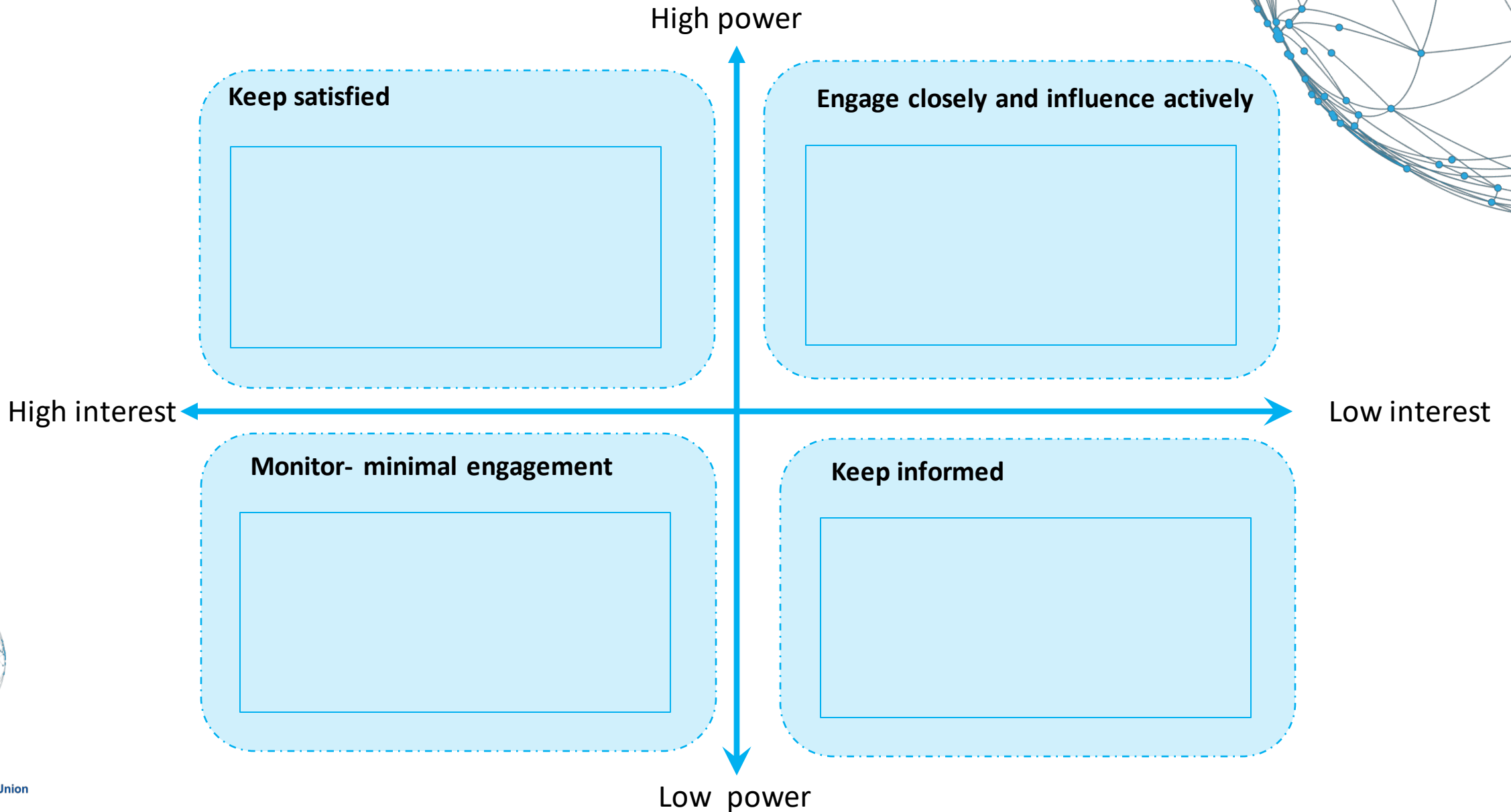
Identify relevant stakeholders: use the following table to identify the key internal and external stakeholders.

Internal Stakeholders	External Stakeholders



# ANNEX 1

Place each stakeholder that you identified in Step 2 on the map below



# ANNEX 2

## Digital Technologies

- Open-source Software
- Crowdsourcing/ crowdfunding
- Digital services/ Web-based Software
- Cloud computing
- Blockchain
- Social media
- **ADD OTHER DTs accordingly**

## Define

**Inbound activities**  
Identify accordingly

**Outbound activities**  
Identify accordingly

## Design

**Inbound activities**  
Identify accordingly

**Outbound activities**  
Identify accordingly

## Validate

**Inbound activities**  
Identify accordingly

**Outbound activities**  
Identify accordingly

# ANNEX 3

## Visioning the Change

Change you wish to implement	Relevant Strategic Goal /matching strategic goal



# ANNEX 3

## Identify KPIs

Current situation ( baseline of how the things currently stand)	Ways of improvement	How will you measure the improvement?



# ANNEX 3

## Setting the team

- Who will oversee that task
- Who will be responsible for the implementing it

Identify each step of each change	Staff member overseeing it	Staff member responsible for implementation

