



# Pomeranian Social Economy Cluster Model

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# Introduction

The development of the social economy in the Pomeranian Region requires new forms of cooperation. **Social economy entities (SEEs)** operate in a dynamically changing environment: on one hand, they address social needs and local challenges; on the other, they must compete in the market for both social and commercial services. This necessitates collaboration, expertise sharing, the acquisition of business competencies, mutual support, and the creation of broad, joint initiatives that would be difficult for individual organizations to implement independently.

The **Pomeranian Social Economy Cluster (PKES) Model** was developed in response to this need. It is a proposal for building a permanent **cooperation ecosystem** between social economy entities, local governments, the business sector, educational institutions, and other regional partners.

Its primary goal is to strengthen SEEs by creating a space for resource sharing, developing joint services, enhancing professionalization, and establishing a strong, lasting position for the sector within the region.

The development of this model was based on an analysis of the “**Prototypical CSEI set up**” document, which provides a framework for designing **Community-Based Social Economy Initiatives (CSEI)**. Based on this framework, a series of five workshops was conducted. these workshops also served as a pilot, testing various work formats, cooperation models, and the specific areas of interest of social economy entities. The insights gained from these meetings were used to create a model tailored to the specific Pomeranian context.

The PKES Model is therefore both a result of analyzing European best practices and the outcome of a regional **co-creation process**.

This document is intended to serve as a **roadmap** for the establishment and development of the Pomeranian Social Economy Cluster.



## Glossary of Terms and Abbreviations

- **PKES (Pomeranian Social Economy Cluster):** The regional cooperation ecosystem merging a social mission with professional business operations.
- **SEE (Social Economy Entity):** Organizations conducting social and economic activities in accordance with the Social Economy Act. This group includes foundations, NGOs with economic activities, social cooperatives, vocational activation units (ZAZ), and social integration centers (CIS).
- **LGU (Local Government Unit):** Local and regional authorities (e.g., municipal or county offices) that act as key cluster partners, recipients of public services, and supporting members.
- **OWES (Social Economy Support Center):** Institutions forming the regional support system for the sector, offering specialized consultancy and training.
- **CSEI (Community-Based Social Economy Initiatives):** The European framework for social economy initiatives rooted in local communities, which served as the conceptual foundation for the model.
- **NGO (Non-Governmental Organization):** Social entities that can engage with the cluster as main members or partners to pursue shared goals.
- **B2G (Business-to-Government):** The commercial and service model for cluster entities working with the public sector, particularly through public procurement and social contracts.
- **B2B (Business-to-Business):** Business relations and transactions established by the cluster or its members with private companies.
- **B2C (Business-to-Consumer):** Sales and promotional activities targeted directly at individual customers and residents.
- **CSR (Corporate Social Responsibility):** The concept where private companies integrate social interests into their business operations, often in partnership with the cluster.
- **ESG (Environmental, Social, and Governance):** International standards regarding environmental protection, social responsibility, and corporate governance for which the cluster provides consultancy services.
- **GDPR (General Data Protection Regulation):** The European regulation on personal data protection (known in Poland as RODO), a key topic for operational standard-setting training.
- **KSeF (National e-Invoice System):** The mandatory Polish electronic invoicing system for which the cluster provides educational support to its members.
- **CRM (Customer Relationship Management):** Software systems used by the cluster for professional management of relationships with clients and partners.
- **IT (Information Technology):** The digital resources, systems, and tools necessary for efficient communication and workflow within the cluster.
- **FTE (Full-Time Equivalent):** A standard unit to measure a worker's involvement (e.g., 0.5 FTE represents a part-time position).
- **SRP (Socially Responsible Procurement):** The practice of incorporating social considerations into purchasing and tendering processes to favor entities with a social impact.

# Context and Model Assumptions

## The Context of Social Economy in the Pomeranian Region

The social economy in the Pomeranian Region is developing amidst a high diversity of entities and a dynamically changing legal and socio-economic environment. Analyses and discussions with workshop participants indicate that while the sector possesses significant potential—particularly in social services, professional activation, and local community building—its growth is hindered by numerous **structural, competence-related, and branding barriers**.

Since the **Social Economy Act** came into force, the sector has gained formal recognition. However, the complexity of requirements and procedures means that, in its current form, the **Social Enterprise (SE)** status is seen as impractical by many entities. Statutory requirements are time-consuming and demand significant administrative resources, while the associated benefits often remain insufficient to motivate organizations to pursue them. Consequently, some Social Economy Entities (SEEs) opt out of applying for or renewing this status.

The region boasts an extensive support system, including **Social Economy Support Centres (OWES)**, consultancy, and training, which workshop participants rated as more advanced than in many other EU countries. Despite this, many SEEs remain largely dependent on **project-based funding**. This creates a risk of instability and the potential cessation of activities once a project ends. A widely diagnosed issue is the organizations' insufficient preparedness to compete in the market and a lack of sustainable business models.

Another significant challenge is the **low visibility and brand recognition** of the social economy among residents and the business community. SEEs are often perceived merely as "charitable" or "purely social" entities, which makes it difficult for them to attract customers, build partnerships, and secure contracts. The lack of consistent communication and a visible sectoral brand results in limited market opportunities, especially for smaller organizations and those operating outside major urban centers.

The workshops also revealed limitations in the **internal culture of cooperation** within the sector. While many entities declare an openness to collaborate, practice often shows competition for resources, inequalities between large and small SEEs, and a lack of permanent mechanisms for knowledge exchange and coordination. Smaller entities, particularly those in rural areas, face greater difficulties in accessing projects, partnerships, and resources, which stifles their growth.

Despite these challenges, the sector possesses numerous strengths: high social competencies, deep local roots, a developed support infrastructure, growing social awareness, and emerging entrepreneurship.

The **Pomeranian Social Economy Cluster (PKES)** is being established as a direct response to these needs—a systemic solution designed to:

- Build awareness of the social economy;
- Improve the competitiveness of SEEs;
- Develop cross-sector cooperation;
- Strengthen the sector's position in public policy;
- Integrate entities from across the entire region.

## Objective of the Model Development

The objective of developing the Pomeranian Social Economy Cluster Model is to create a comprehensive, practical, and implementable concept for the cluster's operations, which will:

- **Strengthen the potential of SEEs;**
- **Increase their competitiveness and stability;**
- **Develop high-quality social and market services;**
- **Integrate entities and diverse communities;**
- **Act as a partner for public administration and the business sector;**
- **Build a strong, recognizable brand for the sector.**

The model serves as a **roadmap** and a foundation for the further implementation, development, and professionalization of the social economy ecosystem in the Pomeranian Region.

## Scope of the Model

The scope of this document covers the key operational areas of the future cluster, including:

- Vision and strategic objectives;
- Membership model and the role of stakeholders;
- Organizational structure and operational model;
- Service portfolio and the service creation process;
- Financing model and stability mechanisms;
- Risk management system;
- Implementation plan;
- Principles of stakeholder cooperation.

## Foundations of the Model

The development of the PKES model was based on the "**Prototypical CSEI set up**" model, which defines the main elements of European **Community-Based Social Economy Initiatives (CSEI)**. This framework was used to design a series of five workshops that functioned as a pilot.

These workshops allowed for:

- Testing various forms of cooperation and workshop-based work;
- Assessing the interest of the community;
- Gathering data on the needs and barriers of SEEs;
- Developing the key elements of the local cluster model;
- Adapting the European framework to the specific regional context.

The findings from the workshops and the context analysis form the foundation of this document.

## Design Assumptions

The following assumptions were adopted during the creation of the cluster model:

- **Complementarity:** The cluster is meant to strengthen SEEs, not replace them.

- **Voluntary participation:** Cooperation is voluntary, based on shared values and mutual respect.
- **Coordination, not dominance:** The cluster will perform a coordinating function rather than a dominating one.
- **Clarity:** Processes must be simple, transparent, and based on clear rules.
- **Efficiency:** The structure is to be **lean yet stable**.

## Vision and Objectives

### Introduction

The vision and objectives of the Pomeranian Social Economy Cluster form the foundation of its operations and define its long-term strategic direction. The vision identifies the cluster's identity and aspirations, describing its intended role in the region and the social and economic impact it aims to generate. Strategic objectives translate this vision into specific operational areas, allowing for the monitoring of progress and the cluster's overall effectiveness.

### Vision of the Pomeranian Social Economy Cluster

**The Pomeranian Social Economy Cluster is a strong and credible cooperation ecosystem that merges social mission with professional business operations, empowers social economy entities, and generates a tangible impact on the development of local communities.**

The cluster is a space for collaboration and mutual support where entities share resources, knowledge, and experience to jointly develop social and economic activities while strengthening their market position. The cluster puts **people at the center** of its activities, promotes democratic decision-making, and builds a culture of trust, partnership, and transparency.

It is a recognized and influential business player in the region, balancing commercial ambition with a social mission. It organizes events of supra-regional significance, earns prestigious awards, and attracts the attention of large enterprises—all while remaining true to the values of the social economy.

The cluster brand is synonymous with **reliability and quality**. It acts as a catalyst for change, supporting the innovation and growth of its members, and proving that social enterprises can be competitive and attractive to institutional, business, and individual clients.

### Strategic Pillars of the Vision

The vision defines four strategic pillars that shape the cluster's operations:

1. **The Cluster as a Cooperation Ecosystem** The cluster is a shared space for collaboration, not a standalone entity. This logic entails:
  - Resource sharing;
  - Knowledge exchange;

- Co-creation of services and innovations;
- Mutual capacity building.

2. **Merging Social Mission with Business Professionalism** The cluster operates at the intersection of the social and economic spheres. This means:

- Simultaneously creating economic and social value;
- Operating according to market quality standards;
- Building a competitive advantage for SEEs;
- Developing high-quality products and services.

3. **The Cluster as a Credible Partner** Building a strong brand based on:

- Reliability;
- Transparency;
- Quality;
- Responsibility.

4. **The Cluster as a Tool for Local Development** Contributing to the balanced development of the region by:

- Supporting social enterprises in every municipality (*gmina*);
- Job creation;
- Developing social services;
- Building the resilience of local communities.

## Strategic Objectives

The strategic objectives outline the primary directions for the cluster's development and define the desired outcomes over a 3–5 year horizon.

- **Objective 1: Professionalization of the social economy sector.** Enhancing the quality of services and the competencies of social economy entities.
- **Objective 2: Increasing the recognition and appeal of the SEE offer.** Building a strong, modern brand for the social economy sector.
- **Objective 3: Development of joint services and business models.** Expanding the sales and operational capacities of SEEs.
- **Objective 4: Building lasting cross-sector relationships.** Developing partnerships with Local Government Units (LGUs), business, and knowledge institutions.
- **Objective 5: Establishing the financial stability of SEEs.** Strengthening the economic foundations of social economy activities.

## Operational Model

The operational model describes how the Pomeranian Social Economy Cluster functions in its daily practice—covering work organization, communication, member collaboration, and operational mechanisms.

## Form of Operation

In its initial phase, the Pomeranian Social Economy Cluster functions as a **cooperation network** rather than a formalized legal entity. Its activities are based on cooperation bylaws, inter-member agreements, and a designated **Operator** who manages formal and financial matters.

This model avoids costly and time-consuming formalization at the start, allowing the cluster to focus on activities that bring real benefits to its members: building a service portfolio, forming consortia, acquiring clients, developing competencies, and increasing visibility.

The choice of a network-based form for the initial stage is based on expert recommendations: a cluster should not begin with rigid structures and bureaucracy, but rather by testing operational models, building trust, assessing the real potential of its members, and verifying cooperation mechanisms. A network allows for **high flexibility, a lower barrier to entry, and reduced risk**.

In a 2–4 year perspective, formalizing the cluster as an **Association** is a rational developmental step—but only once:

- A stable financial flow is established;
- Cluster services generate a margin;
- The network has established member loyalty and collaboration;
- The Operator no longer needs to play such a dominant formal role;
- There are real needs for representation and advocacy at the institutional level.

The Association is thus a **future goal**, not the starting point.

## The Role of the Operator

Since the cluster does not have legal personality in its initial phase, the **Operator** is a crucial element of the model. The Operator enables the cluster to operate in compliance with the law, manage finances, sign contracts, and deliver services.

The Operator does not replace the cluster's decision-making bodies, nor does it take over its strategic autonomy. Strategic decisions are made by cluster bodies in accordance with the adopted management model. The Operator's role is strictly limited to supporting the cluster's operations.

### The Operator:

- Provides the legal and formal framework;
- Manages accounting and financial settlements;
- Represents the cluster to external partners;
- Employs the coordinator and staff;
- Ensures compliance with regulations;
- Minimizes legal risks for members;
- Acts as a "guarantor" of institutional stability.

The Operator may be selected through a competitive procedure and supported—within their area of expertise—by the Local Government Unit (LGU) announcing the competition or its organizational unit.

Experts have clearly emphasized: without an Operator, a cluster in its network phase is unable to conduct economic activities. The Operator is therefore an **indispensable condition** for the cluster's launch, acting as a stabilizer, a formal "umbrella," and a guide through legal complexities.

## Human Resources and Staffing

For the cluster to operate effectively, it requires a minimum of three key positions:

### 1. Cluster Coordinator (Full-time)

- **Responsibilities:** Daily management, organizing meetings and schedules, animating cooperation between SEEs, internal communication, implementing decisions of the Coordinating Team and General Assembly, maintaining standards, and coordinating working groups.

### 2. Sales and Market Specialist (Full-time)

- **Responsibilities:** Acquiring **B2B (Business)** and **B2G (Government)** clients, conducting negotiations and tendering, managing consortium sales processes, market analysis, identifying niches, and building relationships with business and LGUs.

### 3. Marketing and Communication Specialist (Min. 0.5 FTE)

- **Responsibilities:** Creating the cluster brand, preparing promotional materials, managing internal and external communication, coordinating media presence, and enhancing the public image of social economy entities.

## Cluster Operational Structure

The operational structure of the Pomeranian Social Economy Cluster is designed to balance democratic participation and member engagement with operational efficiency and the capacity for market-driven action. It is based on complementary bodies: strategic, operational, advisory, and executive.

### 1. General Network Assembly (Strategic Level)

The General Network Assembly is the supreme decision-making body of the cluster, providing a space for all **ordinary members** to jointly make strategic decisions. It is here that developmental directions are set, action plans approved, and performance results evaluated, ensuring democratic and participatory management. The Assembly fosters a sense of **co-ownership**, allows for member initiatives, and serves as the foundation for transparency and institutional legitimacy.

- **Frequency:** At least once a year.
- **Participation:** The entire network of members through their representatives.
- **Competencies:**
  - Approving annual priorities and plans;
  - Evaluating cluster performance;
  - Setting long-term development directions;
  - Decisions regarding future formalization (Association);
  - Evaluation and implementation of systemic changes.

### 2. Coordinating Team (Operational Level)

The Coordinating Team is the primary "**steering unit**" of the cluster. It is responsible for translating strategic priorities into specific actions, projects, and operational decisions. It consists of the Cluster Coordinator, a representative of the Operator, and the leaders of the Working Groups, thus merging organizational, formal, and substantive perspectives.

- **Composition:** Coordinator, Operator, Working Group Leaders.
- **Frequency:** Quarterly meetings.
- **Key Tasks:**
  - Implementing approved plans and priorities;
  - Developing action schedules;
  - Monitoring projects and services;
  - Supporting the formation of consortia;
  - Managing partnerships with LGUs and the business sector.

### 3. Working Groups (Executive Level)

Working Groups are practical, **task-oriented teams** where specific actions, projects, and services are developed in response to member and market needs. This is where the core substantive work of the cluster happens—from creating consortia and bids to marketing, education, and social innovation.

- **Modus Operandi:** Theme-based, meeting at least once a month.
- **Example Areas:**
  - Consortia and service portfolio;
  - Marketing and promotion;
  - Advocacy and cooperation with public institutions and business;
  - Education and competency development;
  - Social innovations.
- **Output:** Working groups create **tangible products**: services, campaigns, and consortia.

### 4. Program Board (Advisory and Reputational Level)

The Program Board is a key advisory, strategic, and reputational body. Its purpose is to ensure the cluster develops in alignment with the social economy mission while remaining market-relevant and attractive to public and private partners.

- **The Role of the Board:**
  - Reviewing strategic directions and action plans;
  - Identifying market priorities and building partnerships;
  - Ensuring activities align with core social values;
  - Strengthening credibility with LGUs, business, and donors;
  - Advising on public policy and service quality.
- **Composition:**
  - **Business Leaders:** High-profile individuals who provide market credibility and open doors to B2B partnerships. They bring practical knowledge of sales and quality standards, helping the cluster avoid "**project-based thinking**" and focus on market demands.
  - **LGU Representatives:** Experts in public procurement and local policies.
  - **Social Economy Experts:** Professionals bridging the gap between social and business dimensions.

- **Academia and Research Institutions:** Providing scientific perspectives and evaluation tools.
- **Established SEEs:** Large, experienced entities sharing practical "know-how."
- **The Operator:** Representing the formal and institutional aspect of the cluster.

## The operating model

The operating model defines the work rhythm, quality standards, and project execution principles, creating the foundation for the practical operation of the cluster as an entity supporting and developing the social economy sector.

The operating model includes:

- **Regularity of cluster activities**

A regular work rhythm is the foundation of the cluster's stability and predictability. Once a year, the General Network Assembly is held, which sets strategic directions and evaluates previous actions. Quarterly meetings of the entire member network are organized to exchange information, integrate, and present progress and plans. Working groups operate continuously and meet at least once a month to implement specific tasks and projects. Integration activities are also held once a year, strengthening relationships and the culture of cooperation among members. Service consortium meetings are organized flexibly – depending on the needs arising from specific orders or prepared offers, which allows for an efficient response to market dynamics and customer expectations. In addition to the General Network Assembly, working meetings of the entire member network are organized quarterly.

- **Project-based work**

The cluster's operating model is based on project work, which gives the structure real agency. Every action and initiative of the cluster takes the form of a project, possessing clearly defined goals, a leader responsible for coordination, and an execution team selected with consideration for competencies and resources. Work is conducted based on a schedule with defined stages and – in the case of activities requiring outlays – a budget or an indication of necessary resources. Projects must have measurable results corresponding to the cluster's goals, allowing for an assessment of their effectiveness. Every project is subject to reporting, and after its completion, an evaluation is conducted with the aim of drawing conclusions and improving the quality of future actions. Decisions to launch projects are made in accordance with the competencies of the cluster's structures, and their implementation is monitored by the Coordinating Team.

- **Resource sharing**

One of the central elements of the cluster's operability is the resource-sharing system, which promotes economic efficiency and strengthens the competencies and operational capabilities of its members. The cluster provides shared communication tools to facilitate the constant flow of information and coordination of tasks. It creates a service catalog and standard document templates that improve the quality and consistency of offers prepared by consortia or individual SEEs. It provides marketing back-end support, including materials, branding, and promotion channels. Members can use shared expert, hardware, and spatial resources, which reduces costs and allows for the implementation of larger-scale projects. Joint procurement further lowers the operating costs of

SEEs, making them more competitive. The rules for using shared resources are defined in the cluster's regulations and operational arrangements.

- **Communication**

Effective communication is key to the efficient operation of the cluster as a cooperation network. For this purpose, a multi-channel information exchange system is in place – official announcements are sent via email, while ongoing exchange and project work take place through instant messengers. The cluster newsletter serves to provide regular updates and information about events, offers, and members' successes. The website acts as a showcase for the cluster and an information tool for clients and external partners, supplemented by activity on social media. Cluster documents and resources are organized and available in a repository, which ensures transparency, easy access to materials, and minimizes information barriers for members.

## Membership Model

The membership model defines the principles for building the Pomeranian Social Economy Cluster community. It outlines the roles and expectations for members and specifies how entities can engage in cluster activities.

The model is built upon three core values: **transparency, inclusivity, and professional cooperation**, which serve as the foundation for the entire cluster's operations.

In exchange for accessing the cluster's value, members are expected to actively participate in working groups, projects, or network initiatives—proportionate to their capacity and stage of development.

## Member Categories

The Pomeranian Social Economy Cluster distinguishes three main categories of membership, corresponding to different levels of participation and influence.

### Main Members

Main Members form the foundation of the cluster. This category is open to all **Social Economy Entities (SEEs)** operating within the Pomeranian Region, including:

- Social Enterprises;
- Social Cooperatives;
- Non-governmental organizations (NGOs) conducting paid or economic activities;
- Social Integration Centres (CIS);
- Vocational Activation Units (ZAZ);
- Occupational Therapy Workshops (WTZ);
- Social Economy Support Centres (OWES);
- Other entities meeting the legal definition of an SEE.

Upon admission, Main Members enjoy full membership rights, including the right to vote on operational matters and full access to all resources, services, and tools.

- **Value Proposition for Main Members**

The value the cluster provides depends on the entity's stage of development. Therefore, the value proposition is tailored to two distinct groups:

- a) **Small and Emerging Entities**

For small and start-up entities, the cluster serves as a space for capacity building, professionalization, and expanding their reach, allowing them to grow faster and more deliberately. Entities from smaller towns become stronger, more visible, and gain real opportunities for development and job creation.

**Detailed Value Proposition:**

- **Expansion Beyond Local Markets:** The cluster enables organizations to move beyond their immediate surroundings and increases their regional visibility.
- **Access to Larger Contracts and Consortia:** Through the cluster structure, smaller SEEs can participate in projects that would be impossible to execute independently.
- **Modern Knowledge and Professionalization:** Training, mentoring, consultancy, and access to standards and best practices support continuous competency development.
- **Joint Promotion and Credibility:** Small entities benefit from the economies of scale and the trust associated with the established cluster brand.
- **Cost Optimization through Resource Sharing:** Shared tools, infrastructure, and joint procurement significantly lower operational overheads.

- b) **Large, Experienced, and Dynamic Entities**

For established and experienced entities, the cluster provides a platform for scaling operations, building prestige, and strategic development, allowing them to expand their influence and join forces with other sector leaders.

**Detailed Value Proposition:**

- **Execution of Large-scale, Ambitious Projects:** The cluster creates the necessary conditions for building consortia and managing high-value, wide-reach initiatives.
- **Expansion into New Markets:** Utilizing the recognized cluster brand and cross-sector partnerships, large SEEs can significantly increase their scale of operations.
- **Strong Cooperation Network and Knowledge Exchange:** Collaborating with other sector leaders accelerates growth and fosters the creation of social innovations.
- **Enhanced Brand and Reputation:** Membership in the cluster increases an organization's prestige in the eyes of clients, business partners, and local government units.
- **Direct Influence on the Sector's Future:** Large entities can participate in setting industry standards, proposing strategic directions, and influencing public policies.

## **Supporting Members**

This category includes entities that are not SEEs but support the cluster's development through knowledge, resources, or cooperation. These include:

- Local Government Units (LGUs);
- Public institutions;
- Private enterprises;
- Universities and educational institutions;
- Industry and infrastructure organizations.

Supporting members participate in cluster activities in a **non-voting capacity**. Their primary role is to strengthen the ecosystem and create partnerships essential for sectoral growth. They may participate in advisory and project work, including the Program Board, according to established rules.

### Strategic Partners

Strategic partners collaborate with the cluster on specific ventures or thematic areas without formal membership. They expand the cluster's reach and enable larger-scale projects. These may include:

- Companies implementing CSR (Corporate Social Responsibility) initiatives;
- International expert organizations;
- Other business and social clusters;
- Industry networks and research centers.

Strategic partnership is project-based or thematic and does not grant membership rights or participation in the cluster's decision-making structures.

## Membership Criteria

Membership in the PKES is available to entities that meet the following requirements:

### For Main Members:

- They are **Social Economy Entities (SEEs)**;
- They operate within the **Pomeranian Region**;
- They accept the mission, values, and bylaws of the cluster;
- They declare a readiness for **active participation** in projects, working groups, or network initiatives;
- They operate in accordance with **ethics and social responsibility** (compliance is assessed via a declaration and, where justified, public information);
- They aim to develop their social and/or economic activities in cooperation with other cluster members.

### For Supporting Members:

- They provide or declare a readiness to provide resources, knowledge, or partnerships vital to the cluster's goals;
- They operate in alignment with the cluster's values.

**Note:** Supporting members do not have voting rights and do not participate in strategic decision-making.

## Excluded Entities:

- Political parties;
- Religious organizations;
- Organizations or enterprises that violate human rights, ethics, or social values.

## Onboarding Process for New Members

The admission process ensures that the network is joined by entities genuinely interested in market development and cooperation. The recruitment mechanism is **selective, not mass-oriented**; its purpose is to eliminate "inactive members" who might view membership merely as a prestige entry or a gateway to grants rather than a business tool.

**Step 1: Application** The interested entity submits an application form, which includes:

- A description of activities and social mission;
- A presentation of experience and resources (competencies, equipment, service potential);
- A clear **motivation for membership**, emphasizing market development and collaboration;
- Acceptance of the cluster's rules and cooperation values.
- **Note:** Submission does not guarantee admission. The focus is on **why** the entity wants to join: the cluster is a space for market cooperation, not a grant distribution instrument.

**Step 2: Formal and Substantive Verification** The Cluster Coordinator evaluates the candidate based on:

- Compliance of their legal status with membership criteria;
- Alignment with the cluster's mission and cooperation values;
- Readiness to participate in developmental activities;
- Potential synergy with existing members.

**Step 3: Introductory "Reality Check" Meeting** A meeting between the candidate and the Coordinator (or operational team) to:

- Ensure mutual understanding of goals and expectations;
- Discuss cooperation and communication rules;
- Clarify the candidate's role and developmental needs.
- **Crucial Element:** This stage serves as an "**honest disclosure**"—emphasizing that the cluster is NOT a source of grants, but a market cooperation network. This aligns expectations and reduces the risk of future disappointment.

**Step 4: Admission Decision** The final decision is made by the **Coordinating Team** based on the Coordinator's recommendation. The Operator oversees the formal and legal compliance of the process.

- **Possible Outcomes:** Admission, conditional admission, or refusal (with justification).
- **Timeline:** The process is completed within 30 days.

## Joining Fee

In the initial phase of the cluster's operation (as an informal network with an Operator), the immediate introduction of fees is **not recommended**.

However, at a later stage—especially if there is high interest—a one-time **joining fee** should be considered. Its primary purpose is to eliminate "passive members" who might apply without considering whether the cluster truly meets their needs. This fee serves as a commitment mechanism rather than a purely financial instrument.

## Member Rights and Obligations

### Member Rights

Every member has the right to:

- **Participate** in all cluster activities and events;
- **Access** resources, tools, and services (subject to the cluster's operational bylaws);
- **Propose** projects, ideas, and initiatives;
- **Engage** in consultations and Working Groups.

**Note:** Main Members hold the additional right to **vote** on cluster matters.

### Member Obligations

Cluster members commit to:

- **Adhering** to the cluster's mission and values;
- **Cooperating** actively with other members;
- **Maintaining a minimum engagement level:** Participating in at least **two actions per year** (e.g., projects, working groups, consortia, events, or network initiatives);
- **Protecting** the image and reputation of the cluster;
- **Providing** up-to-date organizational data;
- **Complying** with the cluster's branding and logo usage guidelines;
- **Paying** membership fees (as applicable per subsequent agreements).

### Accountability and Termination of Membership

Membership may be suspended or terminated if an entity:

- **Violates** the cluster's values or code of ethics;
- **Acts to the detriment** of the cluster or its members;
- **Persistently fails** to fulfill its obligations;
- **Loses its SEE status** (Social Economy Entity status).

Decisions regarding the termination of membership must be **justified** and are subject to a **right of appeal**.

# Service Portfolio

The Service Portfolio of the Pomeranian Social Economy Cluster is designed to directly support the cluster's strategic goals: increasing the competitiveness of Social Economy Entities (SEEs), improving their visibility, professionalizing their operations, fostering cooperation, and building lasting market relationships with Local Government Units (LGUs) and the business sector.

These services are not "project-based" or purely advisory; they are tools for increasing sales, enhancing service quality, and building a strong sector brand. The scope and availability of services may vary depending on membership category, an entity's stage of development, and the rules defined in the cluster's operational bylaws.

## Core Pillars of the Cluster Offer

The cluster's offer is concentrated in five key areas that address the strategic challenges of the SEE sector:

1. Strengthening the SEE Business Offer: Building consortia, developing B2B and B2G sales, and professionalizing/standardizing services.
2. Increasing Visibility and Recognition: Marketing activities, a shared "umbrella brand," joint campaigns, and presence at key events.
3. Education and Competency Development: Specifically focusing on business, sales, quality management, and leadership skills.
4. Advocacy and Cross-Sector Cooperation: Facilitating the use of social clauses, building awareness of market benefits for partners, and liaising with public and private institutions.
5. Resource Sharing and Service Integration: Building a "sharing economy" within the cluster, barter systems, joint procurement, and operational support.

These pillars directly deliver on:

- The objective of increasing SEE competitiveness;
- The need for growth in market-derived revenues;
- The professionalization of operations;
- The creation of a cooperation ecosystem and consortia;
- The enhancement of the sector's public and market profile.

### Area I: Support in Creating a Competitive Business Offer

The cluster functions as a Market Service Development Hub. Its primary task is to transform the potential of social economy entities into professional, competitive business offers.

The goal is to enable members to effectively enter the B2B (Business-to-Business) and B2G (Business-to-Government) markets by increasing their scale of operation, sharing resources, and creating products that meet the high standards of institutional and commercial clients. The cluster strengthens the sales capacity of SEEs by supporting business model development and fostering conditions for large-scale contracts.

The ultimate result is a fundamental shift in the SEE operating model: moving from a grant-dependent, project-based approach toward a market-driven, stable, and professional business

model. The cluster's role is coordinating and organizational; it does not assume legal liability for individual entities unless specifically defined by project-specific regulations.

Scope of activities includes:

- Consortia Animation: Actively forming groups of entities to respond to specific market needs.
- Bidding Support: Providing expertise in bid preparation, pricing strategies, and contract negotiations.
- Common Service Catalog: Developing and maintaining a unified portfolio of products and services.
- Sales and Lead Generation: Proactively identifying opportunities and securing orders for members.
- The "Wholesaler" Function: Acting as an aggregator of production capacities, allowing small entities to fulfill large-scale orders collectively.
- Contract Coordination: Managing the delivery of joint contracts (e.g., large-scale catering, regional events).
- Service Standardization: Implementing common quality standards and unified operational processes across the cluster.

## Area II: Increasing Visibility and Brand Building

The cluster's role is to establish a strong, consistent, and recognizable presence for social economy entities in the market, ensuring they are perceived as professional and reliable providers of products and services. This area focuses on building the visibility of the **entire sector** rather than individual organizations—through collective communication, marketing activities, and the development of an **umbrella brand**.

The cluster aims to break down the perception barriers that often prevent SEEs from reaching business clients, public administration, and consumers. The core objective is to validate the sector's offer and enhance its credibility. Usage of the shared umbrella brand may be contingent upon meeting specific quality and professionalism standards.

Scope of activities includes:

- Participation in industry trade fairs and conferences beyond the social economy sector;
- Development of a **Shared Umbrella Brand** for products and services;
- Executing B2B and B2C campaigns (with a primary focus on B2B);
- Implementing "shop-in-shop" models: product displays and stands in retail points (shops, cafes);
- Joint promotional assets (photoshoots, catalogs);
- Promoting SEE success stories and leaders (case studies);
- Media relations and public presence.

## Area III: Education, Training, and Competency Development

In this area, the cluster acts as a "**Competency Accelerator**"—strengthening the business, operational, and managerial capacities of SEEs so they can compete on equal footing with commercial entities. This includes developing skills not only in social mission areas but also in "hard" business domains such as sales, marketing, financial management, and logistics.

The primary goal is the professionalization of SEEs, ensuring their ability to independently grow and maintain long-term stability. The cluster supports leaders, teams, and entire organizations to build resilience and prevent burnout or isolation. The educational curriculum is tailored to real market needs and current member projects.

#### Scope of educational services:

- **Mastermind groups** for SEE leaders;
- Training in sales, marketing, and customer service;
- Hard-skills training: accounting, GDPR, **KSeF (National e-Invoice System)**, and social clauses;
- Business mentoring;
- Management development and burnout prevention;
- Managers' clubs and exchange of best practices;
- **"Operational Emergency" series** – rapid response to changes in legislation;
- Industry-specific training (catering, handicrafts, events, etc.).

### Area IV: Advocacy and Cooperation with Public Institutions and Business

The objective of this area is to foster an environment conducive to the development of the social economy through advocacy and raising awareness among administration and business sectors. The cluster serves as a representative and mediator between the social sector and public/private entities to increase SEE participation in procurement and market cooperation.

This area focuses on creating systemic and procedural conditions that facilitate SEE operations, increase access to tenders, and promote the use of **social clauses** and socially responsible procurement. It is a space for strengthening the sector's influence and building partnership-based relationships.

#### Scope of services:

- Educating LGUs and businesses about the social economy;
- Training on social clauses and SEE-inclusive procurement;
- Assistance in preparing tender documentation;
- Creating **"benefit packages"** for SEE-business cooperation;
- Interest advocacy for the sector;
- Lobbying and educational initiatives.

### Area V: Resource Exchange and Internal Support

This area focuses on resource sharing among cluster members and creating a mutual support system that lowers operational costs and increases efficiency. Its goal is to allow SEEs to benefit from **economies of scale**—through barter, joint procurement, shared equipment, or operational resources—while developing sectoral solidarity based on a tangible exchange of value.

Internal cooperation aims to create a secure environment where smaller or less experienced organizations can draw upon the potential of larger, more established entities.

#### Scope of services:

- Barter of services and resources;

- **Joint procurement** and collective ordering;
- Shared equipment and office/production spaces;
- **"Rapid Response" system** for urgent needs;
- Internal member communication platform;
- Mentoring and crisis support.

## The Cluster's Commercial Offer

The Pomeranian Social Economy Cluster will provide its own proprietary commercial services. These services do not consist of mere brokerage for the offers of individual members; instead, they focus on creating products and tools that respond to market needs and support the professionalization of the sector. Through these services, the cluster achieves its strategic goals: strengthening the potential of Social Economy Entities (SEEs), increasing their visibility, fostering cross-sector cooperation, and implementing quality standards.

Simultaneously, the commercial offer serves as a primary source of **funding for the cluster**. It provides stable, independent revenue streams, reducing reliance on project-based grants and enabling the sustainable operation and development of organizational structures. Thus, commercial services are not only a benefit to members but also a tool for building **financial resilience** and a professional market image.

### Target Audience:

- Local Government Units (LGUs);
- Public administration;
- Private enterprises;
- Non-governmental organizations (NGOs);
- Educational institutions.

### Key Categories of Cluster Commercial Services

**1. Specialized Training** The cluster offers proprietary training programs tailored for LGUs, businesses, SEEs, labor market institutions, and NGOs.

- **Key Topics:** Social economy and social entrepreneurship, application of social clauses and socially responsible procurement, CSR and ESG in practice, development of social services, cross-sector cooperation, and professionalization of NGOs/SEEs (management, marketing, sales).

**2. Social and Institutional Audits** The cluster provides expert auditing services to ensure high standards of social impact and compliance.

- **Scope:** Accessibility audits, social audits, analyses of the social potential of LGUs and companies, and recommendations for incorporating SEEs into procurement policies.
- **Note:** This is an advisory and expert service developed by the cluster itself, rather than "rented" from individual SEEs.

**3. Advisory and Consulting Services** The cluster's consultancy wing supports partners in strategic planning and social integration.

- **Scope:** Developing SEE-collaboration strategies, consulting on social clauses, support in social service planning, designing CSR and ESG programs, and preparing LGUs for socially responsible tenders and competitions.

#### 4. Quality Development and Certification of Social Services

The cluster aims to function as a regional standard-setter.

- **Role:** Acting as a certifying body for SEE service standards and a quality auditor for social services. This allows the cluster to build its own **recognized quality mark** that is valued in the marketplace.

#### 5. Expert, Research, and Analytical Services

Leveraging its unique position and data access, the cluster provides high-level insights.

- **Scope:** Market and sectoral analyses, local social needs assessments, and expert reports for LGUs and private companies.

### Principles of Commercial Offer Development

The cluster develops commercial services independently as its own **proprietary products**, designed and promoted under the cluster brand. This means that the cluster assumes full responsibility for the preparation, quality, and delivery of these services, even when the specific competencies and resources of its members or partners are utilized.

These services are built upon:

- **Cluster Know-how:** Strategic expertise in social economy, the social services market, and cross-sector cooperation.
- **Member Assets and Competencies:** Members are engaged as experts, trainers, consultants, or subcontractors.
- **Partner Networks:** Cooperation with LGUs, educational institutions, corporations, and support organizations.

#### Key Operational Principles:

- Services are marketed exclusively under the **cluster brand**.
- The cluster is accountable for **quality standards and final outcomes**.
- The cluster does not act as a mere broker for individual SEE products; SEEs do not sell these specific cluster-developed services as separate entities.

This approach ensures that the cluster:

- Sells its own value proposition rather than just individual member offers;
- Builds its own **market position and expert reputation**;
- Generates revenue that strengthens its **financial stability** and fuels the development of the entire ecosystem.

## Service Consortia

Service consortia are a vital operational form of the Pomeranian Social Economy Cluster. Their role is to enable social economy entities to enter the market at a **scale** they could not achieve independently. Consortia increase competitiveness by fostering collaboration, resource sharing, and the merging of diverse competencies.

Beyond member support, consortia are a cornerstone of the cluster's economic model. By delivering services under the PKES brand, they generate revenue, including an **operating margin**, thereby building the cluster's financial sustainability as an organization.

In essence, consortia serve a dual purpose: they are a **support tool for members** (providing practical experience and capacity building) and a **strategic revenue source** that ensures the cluster's long-term viability.

## Functions of Consortia

Consortia perform four functions in the cluster system:

1. **Competency Integration:** By involving multiple SEEs, the cluster can create multi-faceted services—for example, combining social care, local animation, catering, logistics, and consultancy into a single, comprehensive package.
2. **Scalability:** Consortia enable members to pursue large-scale public or commercial contracts and tenders that are typically out of reach for individual organizations.
3. **Secure Cooperation Framework:** Based on clearly defined roles, responsibilities, and budgets, consortia provide a structured environment that minimizes the risk of conflict or operational chaos.
4. **Capacity Building Mechanism:** Joint projects facilitate knowledge exchange, "learning by doing," and the development of specialized industry expertise among members.

## Financing

A stable financing model is one of the cornerstones of the Pomeranian Social Economy Cluster's sustainability. The cluster requires funds both for its daily operations and for project development, member support, and the preparation of market-ready offers.

## Sources of Funding

**1. Membership Dues** Dues provide a steady source of income, though they are not intended to cover the total cost of cluster operations.

- **Principles:** Fees are scaled to the size and capacity of the SEE; separate fee structures apply to supporting members (e.g., businesses, LGUs).

**2. Operating Margins and Fees from Service Consortia** Revenue generated from the management and coordination of joint contracts and tenders executed by cluster members.

**3. Sales of Proprietary Commercial Services** Direct income from the cluster's expert offer (training, audits, consultancy), as described in the previous section.

**4. Sponsorship** A market-based source of funding that supports both operations and developmental initiatives. The sponsorship mechanism is based on cooperation with the business sector, institutional partners, and entities interested in corporate social responsibility (CSR) and brand visibility.

**5. Projects and External Funding (National and International)** Grants and external funds are viewed as tools for **development and innovation**, rather than for covering basic maintenance costs. This distinction is vital for maintaining long-term financial independence.

## Resource-based Support (In-kind Contributions)

In addition to financial revenue, non-financial contributions are a key element of the PKES model. They lower overhead costs and increase the cluster's operational capacity. By leveraging the existing organizational, expert, and infrastructure resources of the Operator, members, and partners, the cluster can expand its offer without bearing full market costs.

### The Operator may provide:

- Administrative and accounting support;
- Office and meeting spaces;
- IT tools and platforms;
- Technical equipment and resources.

### Members may contribute:

- Conducting training and mentoring sessions;
- Coordinating Working Group activities;
- Providing access to specialized equipment;
- In-kind contributions (e.g., logistics, transport, venue space);
- Specialized know-how.

### Supporting Members and Partners may provide:

- Industry-specific expertise;
- Organizational resources;
- Space and equipment;
- Promotional and marketing support.

## Operating Costs

The operating costs of the Pomeranian Social Economy Cluster include both fixed and variable expenses necessary to ensure efficient functioning. The financial strategy dictates that fixed costs should be covered to the greatest extent possible by stable revenue streams (e.g., membership dues + margins), while variable costs are financed through project funds, sponsorship, and service revenues.

## Fixed Costs

Fixed costs relate to maintaining the core infrastructure, ensuring operational continuity, and providing administrative support. These include:

- Personnel costs for key cluster staff, specifically:
  - Network Coordinator;
  - Sales and Lead Generation Specialist;
  - Marketing and Communication Specialist.
- Administrative and accounting support;
- Digital tools: communication platforms, CRM systems, and document repositories;
- Communication and promotional activities;
- Maintenance of the website and IT systems;
- Banking, accounting, and insurance fees;
- Minimum operational costs for cluster bodies (General Network Assembly, Coordinating Team, Program Board).

**Strategic Note:** Due to the role of the Operator, some of these costs may be temporarily limited or shared, significantly lowering the barriers to entry for the cluster during its initial phase.

## Variable Costs

Variable costs result directly from the cluster's specific activities, consortia, and commercial services. These include:

- Remuneration for experts, trainers, and consortia coordinators;
- Event organization costs (logistics, catering, venue hire);
- Marketing services, PR, and promotional materials for specific campaigns;
- Production and organization of training sessions, campaigns, or workshops;
- Costs associated with executing consortium contracts;
- Purchase of services and materials necessary for project implementation;
- Research and Development (R&D) activities, including service piloting;
- Adjustment of digital tools, legal software licenses, and IT integration.

## Non-financial Contributions vs. Costs

The cluster model assumes the extensive use of in-kind (non-financial) contributions provided by the Operator, cluster members, and partners. This ensures that a significant portion of organizational and operational needs are met without direct financial outlays, effectively lowering the cluster's cash requirements.

Key non-financial contributions include:

- Provision of office and training spaces;
- Provision of technical equipment;
- Administrative or accounting support;
- Execution of promotional activities;
- Contribution of expert know-how and resources.

These contributions allow the cluster to limit budget expenditures while maintaining high-quality operations. In-kind contributions may be recorded and reported in accordance with applicable regulations, particularly when required by external funding sources.

## Phased Financial Development

A phased approach allows for a gradual increase in financial independence—moving from a start-up phase, where the Operator's support and in-kind contributions are vital, to a stage where the cluster develops its own revenue streams based on margins, commercial services, and partner collaborations.

This model is realistic, mitigates excessive risk during the initial operations, and ensures that development occurs at a pace aligned with the growing scale of activities and membership base.

### Phase I: Start-up and Incubation

- **Operator Support → Minimal Fixed Costs:** Leveraging the existing infrastructure of the lead organization.
- **In-kind Contributions:** High reliance on shared resources and expertise.
- **Project Funds + Sponsorship:** Initial funding driven by grants and early-stage partners.
- **Nominal Membership Dues:** Low-entry fees to encourage participation.

### Phase II: Growing Independence

- **Margins + Commercial Services:** Increasing revenue from the cluster's own expert offer and consortium activities.
- **Reducing Grant Dependency:** A strategic shift toward self-generated income.
- **Diversified Funding:** Expanding the pool of sponsors and commercial partners.

### Phase III: Stability and Scaling

- **Margins and Services as Dominant Sources:** The majority of the budget is covered by market-driven revenue.
- **Dues as a Stabilizer:** Membership fees act as a predictable foundation for core administrative tasks.
- **Market-driven Sustainability:** Costs are primarily covered by commercial activities and high-value partnerships.

## Risks and Mitigation Mechanisms

Effective risk management is a cornerstone of the stability of the Pomeranian Social Economy Cluster. As a network organization integrating entities of varying scales, experiences, and resources, the cluster is exposed to specific risks arising from:

- The dynamics of inter-organizational cooperation;
- The simultaneous management of multiple projects and services;
- Market-based and public activities;

- The need to maintain high quality and professional standards;
- The specific characteristics of the social economy and its financial volatility.

**Risk management serves two primary objectives:**

1. Minimizing threats to the cluster's operations.
2. Ensuring the security and stability of cluster members.

## Risk Categories

The PKES risks are categorized into six core areas:

1. Strategic Risks;
2. Organizational and Governance Risks;
3. Financial Risks;
4. Operational Risks;
5. Collaboration and Relationship Risks;
6. Reputational and Communication Risks.

Each category encompasses both short-term and long-term risks.

- **Strategic Risks**

One of the most significant strategic risks is an insufficient number of active members or their passive attitude. This could lead to a situation where the cluster becomes a formal structure without real operational capacity. The remedy is a planned onboarding process for new members, clear communication of the benefits of belonging to the cluster, a micro-engagement system, and matching working groups to member competencies. Regular evaluation of activity levels allows for the identification and prevention of a decline in engagement.

The cluster is also exposed to the risk of lacking a recognizable position in the region, which may limit its ability to represent the sector and secure orders. To prevent this, it is necessary to systematically build the brand—both through communication and media presence, and through cooperation with LGUs and the business environment, as well as the promotion of specific successes and results of the cluster's activities.

An additional strategic risk is an inappropriate definition of the scope of action—either its excessive expansion or a profile that is too narrow. The response is a flexible service portfolio model, in which some activities are core and stable, and others can be developed or phased out based on annual evaluations and decisions of the General Network Assembly. Regarding the financing model, a key strategic risk is too slow a pace of transitioning from project funding to margins and commercial services, which could make the cluster dependent on external funds. Incorporating phased development, minimizing fixed costs, and prioritizing investment in sales and marketing constitute the basic prevention mechanisms.

- **Organizational Risks**

An organizational risk is an insufficient number of individuals capable of managing the cluster operationally. Since the model assumes the professionalization of activities, it is particularly important to ensure the employment of a coordinator and persons responsible for sales and

marketing. This can be addressed through the phased expansion of the team, delegating some tasks to working groups, and utilizing the resources and competencies of supporting members.

An unclear division of responsibility between bodies and working teams may cause conflicts, delays, or duplication of activities. Therefore, it is crucial to precisely define roles, duties, and decision-making rules, and to implement communication and project work standards. Transparency in decision-making processes and clear internal procedures minimize the risk of disputes and misunderstandings. An organizational risk is also the possibility of a conflict of interest between members—especially in the context of consortia and market services. This is prevented by a transparent system of rules for the allocation of tasks and responsibilities and the visibility of decision-making processes.

- **Financial Risks**

A financial risk is the dependency of the cluster's functioning on a single revenue source, such as grants or subsidies. Financial diversification, limits on the share of individual sources (e.g., a maximum of 40% of the budget), the development of commercial services, and the creation of operational reserves reduce this threat.

A specific risk related to the SEE sector is the financial instability of some entities participating in consortia, which may lead to the non-execution of orders. This can be counteracted by assessing the potential of entities before they join consortia, appropriate selection of partners, and planning operational support for weaker SEEs. Another risk is the mismanagement of the cluster's budget or a lack of cost control. This can be managed through a financial policy, a quarterly reporting system, and internal audits, as well as the phased implementation of fixed costs.

- **Operational Risks**

Communication problems may occur, especially in projects involving multiple entities. To limit them, internal communication tools, clear project management procedures, and regular meetings should be used. Unrealistic schedules and member overload may lead to the non-performance of orders. Prevention mechanisms include feasibility assessments before signing contracts, the appropriate selection of entities for consortia, and realistic planning of time and resources.

- **Collaboration and Relationship Risks**

A risk in the social dimension is a decline in trust between organizations or personal conflicts. Building a culture of transparency, facilitation, mediation, and regular integration meetings help maintain positive relationships. Rivalry between SEEs for orders can lead to tensions or undermine the principles of cooperation. Mitigation mechanisms include a transparent system for selecting entities for consortia and clear criteria for the distribution of revenue and responsibility.

- **Reputational and Communication Risks**

Improper use of the cluster brand or inappropriate communication can threaten its reputation. This can be counteracted through a brand manual, clear rules for logo usage, and the designation of persons responsible for communication. Negative events within a single organization may reflect on the reputation of the cluster. Therefore, a code of ethics, reputational risk assessment procedures, and a crisis response policy are necessary.

# Stakeholder Cooperation

The Pomeranian Social Economy Cluster operates within a complex ecosystem of diverse entities, industries, sectors, and social groups. Cooperation with stakeholders is a fundamental condition for its success—both operationally and strategically.

The cluster adopts a philosophy where:

- **Cooperation** is a continuous process;
- **Stakeholders** are viewed as partners;
- **Relationships** are considered a strategic asset;
- **Co-creation** is the primary method of work;
- **Transparency** serves as the foundation of trust.

## Cluster Stakeholders and Their Roles

The PKES collaborates with an extensive network of entities, each bringing unique resources and competencies to the table.

- **Social Economy Entities (SEEs)** form the core of the cluster. They co-create its services and products, contribute industry-specific knowledge and resources, participate in consortia, and utilize developmental support. Simultaneously, they build the sector's public image, demonstrating that social mission can go hand-in-hand with professional business operations.
- **Local Government Units (LGUs)** are key partners in the field of public services and co-financing social initiatives. They also act as professional clients for SEE consortia. Their role involves setting social policy directions and creating an environment conducive to the implementation of socially responsible services.
- **Business and the Private Sector** act as partners in joint ventures and Corporate Social Responsibility (CSR) initiatives. They are also recipients of the production, catering, event, and social services offered by the cluster. Furthermore, companies can provide expertise, technology, and mentoring, supporting the growth of SEEs and strengthening the cluster brand.
- **Academia and Research Institutions** provide the scientific and analytical backbone. They offer specialized knowledge and research, working alongside the cluster to co-develop social innovations. They can also engage in educational programs, internships, and training to boost member competencies.
- **Social Organizations and Public Institutions** participate in social and educational projects, utilize cluster services, and provide insights into local needs and target groups. Their participation strengthens the social dimension of cluster activities and ensures they are rooted in actual social processes.
- **Residents and Local Communities** are both the recipients and co-creators of services and local initiatives. They represent the ultimate reference point for assessing the cluster's effectiveness. Their needs, quality of life, and well-being define the purpose and priorities of the social economy sector.
- **Media and Communication Channels** support the cluster's visibility and brand recognition while enhancing transparency and public trust. Their role is vital for both promoting results and educating the public on the regional value of the social economy.

## Cooperation Models

Relationships with stakeholders within the Pomeranian Social Economy Cluster vary in character and intensity. The cooperation model assumes a gradual deepening of engagement—from basic information exchange and consultation to joint action and long-term strategic partnerships.

- **Model I – Informational Cooperation**

This model serves as a starting point for all stakeholders and builds the foundation for transparency and knowledge flow. It encompasses two-way communication, sharing information about activities, publishing educational materials and reports, and systematically providing updates on initiatives and results. Its goal is to build awareness, prevent misinformation, and involve individuals or institutions that, at this stage, act as observers or recipients of information but are not directly engaged in operational activities.

- **Model II – Consultative Cooperation**

At this level, stakeholders transition from receiving information to co-creating content and decisions. This is a model based on dialogue—it assumes the consultation of strategic documents and service standards, participation in workshops and panels, and the submission of opinions and needs. This method of cooperation increases the sense of shared responsibility for the cluster, minimizes the risk of conceptual errors, and allows for diverse perspectives to be included in the planning of development and specific services.

- **Model III – Operational Cooperation**

This model involves the joint execution of activities, services, and projects—from forming consortia and delivering social and commercial services to the exchange of resources and equipment. It is the most intensive form of daily cooperation, enabling an increase in the scale of SEE operations, the professionalization of services, and the development of competencies through practical experience. This model is based on clearly defined roles, operational standards, and project management tools, which minimizes risk and enhances the quality of implementation.

- **Model IV – Strategic Partnerships**

The most advanced level of cooperation involves long-term, multi-sectoral partnerships aimed at implementing systemic solutions. It entails collaboration with LGUs, business, public institutions, and universities to create public policies, competence centers, joint investments, and social innovations. This model provides the cluster with the opportunity to achieve a lasting regional impact, increase credibility, and secure stable sources of funding and partnerships for years to come.

## Model Implementation Plan

The implementation plan defines a logical sequence of actions—from launching basic operational functions and generating initial value for members to developing market services and formalizing the

legal structure. This phased approach mitigates risks, ensures economic resource management, and delivers tangible value to Social Economy Entities (SEEs) from the very first months of operation.

### Phase 1: Operational Launch

**Objective:** To kickstart the cluster's operations as a cooperation network supported by an Operator and a core team.

- Selection of the Operator: Designating a Local Government Unit (LGU) or an organization selected through a tender to provide legal personality and administrative backbone.
- Appointment of the Coordinator: Hiring a full-time professional to act as an animator and manager.
- Staffing: Recruiting a Sales and Marketing Specialist (minimum 0.5 FTE).
- Governance Framework: Adopting network bylaws and membership criteria.
- Formation of the Coordinating Team.
- Selective Recruitment: Starting the member onboarding process—focusing on business readiness rather than mass enrollment.
- Internal Communication: Launching communication channels, the newsletter, and the document repository.
- Appointment of the Program Board: Inviting business representatives to ensure reputational capital transfer.

### Phase 2: Service Deployment and Value Creation

**Objective:** To deliver initial, measurable benefits to members (competency-based, reputational, and organizational) and establish a foundation for collaboration and peer learning.

- Portfolio Development: Expanding the SEE service catalog and identifying high-potential market and social services.
- Pilot Initiatives: Launching 2–3 pilot joint initiatives as a "proof of concept."
- Thematic Working Groups: Establishing groups focused on specific sectors (e.g., care, catering, education, local revitalization).
- Knowledge Exchange: Organizing thematic meetings to identify shared needs and market barriers.
- Competency Support: Launching peer-to-peer formats, such as Mastermind groups for SEE leaders.
- Brand Visibility: Building the cluster website and creating joint promotional assets.
- LGU Relations: Establishing initial cooperation with local government units.
- Resource Sharing Pilots: Testing the first models for sharing equipment, spaces, and transport.

### Phase 3: Scaling and Ecosystem Strengthening

**Objective:** To develop a broad cooperation ecosystem covering market activities, education, advocacy, and resource exchange while professionalizing cluster entities in a measurable and sustainable way.

- Portfolio Expansion: Broadening the cluster's range of services.
- Networking Scale-up: Increasing the frequency and impact of networking activities.
- Advanced Education: Strengthening training programs focused on high-level business skills.

- Systemic LGU Cooperation: Implementing structured collaboration (consultations, training on social clauses, etc.).
- Shared Branding: Implementing full visual identity and standardized communication across the sector.
- Community Services: Scaling up barter, joint procurement, and shared logistics.
- Knowledge Repository: Developing a database of best practices and industry mentoring programs.
- Business Engagement: Expanding beyond sales into strategic CSR and social partnerships.

#### Phase 4: Consolidation and Professionalization

**Objective:** To ensure the cluster's sustainability as an ecosystem, increase operational capacity, and solidify its regional role in both market and social dimensions.

- Legal Formalization: Transitioning from an informal network to a stable legal form (e.g., Association or Foundation) once sustainability and activity milestones are met.
- Diversified Service Portfolio: Ensuring a balanced mix of:
  - Market services (e.g., catering, events, social care);
  - Social services (e.g., local animation, education);
  - Advocacy (social clauses, LGU dialogue);
  - Community functions (barter, shared resources, mentoring).
- Strategic Partnership with LGUs: Moving beyond service delivery to policy consultation and implementing Socially Responsible Procurement (SRP) standards.
- Corporate Integration: Deepening ties with the business sector through CSR programs, employee volunteering, and development-oriented sponsorship.
- Team Stabilization: Securing long-term operational staff.
- Quality Assurance: Implementing monitoring systems for quality and collaboration standards within consortia.

#### Phase 5: Expansion and Innovation

**Objective:** To extend the cluster's influence beyond the regional level—economically, socially, and educationally—and develop new, innovative cooperation models.

- Market Expansion: Extending services and social activities into neighboring regions.
- International Networking: Participating in national and international cluster and sectoral networks.
- Systemic Solutions: Developing regional SEE service certification, LGU cooperation models, and advanced joint procurement tools.
- Social R&D: Developing and testing social innovations.
- Quality Marks: Launching and promoting shared quality marks for products and services.
- Digital Transformation: Investing in the automation of cooperation processes and resource management.
- Policy Influence: Actively participating in the shaping of regional and national policies.
- Replication: Exporting best practices to other regions.

# Summary and Strategic Recommendations

The Pomeranian Social Economy Cluster Model presents a cohesive concept for building a regional cooperation ecosystem that simultaneously strengthens the potential of social economy entities and enhances their competitiveness in public and commercial markets. The cluster is designed as a flexible and inclusive structure—beginning as a network coordinated by an Operator and gradually maturing into an organizational form with greater independence and sustainability.

At the heart of the model lie three pillars: **cooperation, professionalization, and the creation of combined economic and social value**. Key tools—such as service consortia, the cluster’s commercial offer, a comprehensive training system, and advocacy—complement each other to support both the growth of SEEs and the visibility of the entire sector. Governance mechanisms based on democracy, transparency, and the dual role of the Operator and the Coordinating Team ensure operational effectiveness and scalability.

The financing model integrates diverse sources—operating margins, commercial services, in-kind contributions, sponsorship, membership dues, and external funds—minimizing the risk of dependency on a single funding stream and allowing for stable, long-term development. Finally, the entire system is anchored in the needs of local communities, cross-sector collaboration, and the drive to increase the role of SEEs in the regional economy.

## Strategic Recommendations

- **Secure the Operator’s Role** The role of the Operator should be formally secured for the first three years of operation, with a clearly defined scope of responsibility and a minimum operating budget. Only this model will allow the cluster to launch as a network capable of real coordination, rather than a purely "declaratory" initiative lacking organizational backbone.
- **Ensure Core Staffing** It is essential to secure full-time employment for three key roles: Coordinator, Sales Specialist, and Marketing Specialist. These competencies are vital for professional management, securing contracts, brand development, and stakeholder communication. Without a dedicated team, the cluster remains vulnerable to the risks of volunteer burnout and operational inconsistency.
- **Launch Pilot Consortia** In the initial phase, focus on creating pilot service consortia in high-potential industries such as catering, event management, and social care. This will allow the cluster to test the cooperation model, determine realistic margins, and generate initial revenue while strengthening member competencies. These pilots should serve as the foundation for future scaling.
- **Build a Quality-Driven Umbrella Brand** The development of the umbrella brand should focus on **evidence of quality and credibility**, rather than just visual identity. It is strategic to base the brand on standards, measurable impact, and success stories (case studies) to increase trust among LGUs and businesses. The brand must support sales and advocacy—it should not be an end in itself.
- **Treat Competency Development as an Ongoing Process** The growth of SEE competencies should be a permanent operational element, not a project-based activity. An educational

system—including training, mentoring, and **Mastermind groups**—will professionalize services and level the playing field in terms of business readiness. This is a long-term investment that directly impacts the quality and sustainability of the sector.

- **Deepen LGU Partnerships** Partnerships with Local Government Units should be treated as a pillar of stability. This collaboration should include the joint implementation of public services, training, and social policy development, leading to increased SEE participation in public procurement. LGUs should also be represented in the cluster's advisory bodies.
- **Adopt an Evolutionary Path to Formalization** The formalization of the cluster—for instance, as an Association or Foundation—should only occur after reaching a **critical mass** of activities, services, and resources. Premature formalization risks creating a "paper structure." The model must evolve naturally from an Operator-led network to an independent legal entity only when practically justified.
- **Strategic Synergy with Support Centers (OWES)** Social Economy Support Centers should act as strategic partners in areas of competency development, community animation, and the incubation of new SEEs. The cluster should not duplicate OWES functions but rather complement them by focusing on market access and scaling.
- **Maintain the Market-Mission Balance** It is vital to maintain a balance between market logic and social mission—every action should deliver both economic and social value. This prevents the cluster from turning into a purely commercial entity or, conversely, into a "soft" social initiative lacking market effectiveness. This balance is what ensures the true sustainability and purpose of the cluster.