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# COEUS CAPACITY ENHANCING KIT

## Practical guidance for public authorities and stakeholder organisations



COEUS / INSTITUTIONAL CAPACITY AND SMEs SUPPORT

# Capacity Enhancing Kit

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# 1. Purpose, target users and getting started

The COEUS Capacity Enhancing Kit helps public authorities and stakeholder organisations develop their own Corporate Digital Responsibility (CDR) competences and support small and medium-sized enterprises (SMEs) in applying responsible digital practices. It explains how to select and use the project's educational resources, organise cooperation and support, and review practical results.

**Primary users** include local, regional and national public authorities; business support and innovation organisations; higher education, research and training bodies; professional associations, civil society organisations and stakeholder networks. SMEs are the principal beneficiaries of the wider approach and may also consult the educational resources directly.

The Kit does not introduce a separate training programme. Institutions may coordinate, host, advise, contribute expertise or connect SMEs with support; **not every organisation needs to become a training provider**.

## Three resources, one connected approach

| Core resource | Function within the Kit |
|---|---|
| **CDR Handbook** | Written foundations and practical guidance, including the Workbook, Curriculum and Training Flow. |
| **Training videos** | Recordings used in COEUS training, combined with reading, discussion and practical tasks. |
| **COEUS Strategy** | Direction for sustained integration into institutional activities, SME services and cooperation. |

**Country reference points.** Each COEUS project partner is a reference point for stakeholders and organisations in its country. Approach the relevant partner for orientation on resources, suitable expertise and cooperation. Local organisers retain responsibility for their activities; assistance depends on confirmed responsibilities, expertise and capacity.

## How to use the Kit

Define the objective and audience; establish institutional capacity and relevant contacts; select resources and appropriate support; carry out a defined activity; review the evidence and agree the next step. Use the working tools only where they support the activity, incorporating them into existing records where possible.

| Reading route | Sections / pages |
|---|---|
| **Understand** the purpose, CDR framework and project lessons. | 1–3 / pages 1–3 |
| **Prepare and deliver** through capacity assessment, cooperation and tailored resources. | 4–8 / pages 3–6 |
| **Implement and sustain** through working tools, evaluation and integration. | 9–11 / pages 7–10 |

Source: Supplied chapter 1, "Purpose of the Kit, Target Users and Guidance for Use", §§1.1–1.5. Source notes throughout identify the supplied chapter texts used in this consolidated guide.

# 2. A shared CDR framework

Corporate Digital Responsibility concerns how organisations take responsibility for digital technologies and data and their effects on people, the economy and the environment. It brings together privacy, cybersecurity, ethical technology use, inclusion, sustainability and organisational accountability. Regulation provides a baseline; governance connects responsibilities with decisions, roles, records and improvement.

> **Seven principles guide decisions; four dimensions identify areas of impact; three modules organise learning.** These are complementary levels, not competing models or separate organisational departments.

## Seven core principles

| Principle | Meaning for organisational practice |
|---|---|
| **1. Purpose and Trust** | Make digital responsibility part of organisational purpose, supported by governance and a commitment to positive social and environmental effects. |
| **2. Fair and Equitable Access** | Make digital products and services inclusive and accessible, taking different capabilities into account and treating people fairly. |
| **3. Promote Societal Well-being** | Protect privacy, strengthen digital skills and safeguard people from harmful consequences of technology. |
| **4. Consider Economic and Social Impact** | Be transparent about data and algorithms, consider the distribution of benefits and address adverse effects of automation. |
| **5. Accelerate Progress with the Impact Economy** | Support innovation and investment with positive social and environmental outcomes, including sustainable initiatives. |
| **6. Create a Sustainable Planet** | Use digital innovation to address environmental challenges and understand and report environmental impacts. |
| **7. Reduce Technological Impact on Climate** | Reduce the physical footprint of digital systems through responsible IT planning, renewable energy and efficient hardware use. |

## Four interconnected dimensions

**Economic:** long-term value, responsible investment, the distribution of benefits and workforce adaptation. **Social:** participation, accessibility, inclusion and non-discriminatory outcomes. **Technological:** security, privacy, ethical system operation, transparency and human accountability. **Environmental:** energy and materials throughout procurement, use, maintenance, reuse and disposal.

## Three learning modules

**Module 1 — Basic Principles of Corporate Digital Responsibility.** Establish the conceptual and organisational foundations and relate them to SME maturity, resources and needs.

**Module 2 — Privacy, Security, and Ethical Use of Data.** Connect responsible data handling with cybersecurity, ethical technology use, transparency, fairness and accountability.

**Module 3 — Digital Sustainability, Inclusion and Accessibility.** Address accessible services, diverse user needs, energy efficiency, equipment use and electronic waste.

A principle may apply across several dimensions, and a module may address more than one dimension. Trainers adapt the depth and examples to the audience while preserving this shared framework. Clear organisational responsibility makes learning usable in everyday practice.

Source: Supplied chapter 2, “A Shared Framework for Corporate Digital Responsibility”, §§2.1–2.6.

# 3. Baseline needs and project lessons

The Kit draws on the sequence of needs assessment, programme development, training, pilot implementation and evaluation. Initial assessments, SME Entry–Exit evaluation and trainer feedback provide different perspectives; they are not a single dataset or interchangeable measures of achievement. The central lesson is **practical refinement rather than fundamental programme redesign**.

| Identified need | Kit response and resource | Check of application |
|---|---|---|
| Shared CDR understanding | Use the common framework, Handbook introduction and relevant videos. | Participants explain CDR and its relevance to their role. |
| Different sectors and maturity | Use the needs questionnaire and adapt examples, depth and tasks. | A needs profile explains the selected support. |
| Limited time and capacity | Plan focused activities with discussion and follow-up using the Training Flow. | Agreed tasks are completed; unresolved needs remain visible. |
| More practical implementation tools | Use Handbook checklists and the action-and-evidence record. | An output, responsible person and completion status are recorded. |
| Less familiar sustainability and inclusion topics | Use Module 3 exercises and manageable outputs without narrowing CDR to security alone. | Relevant reviews or changes are documented; impact claims have data. |

The supplied baseline chapter reports higher CDR understanding at Exit for 28 of 34 matched respondents, with six unchanged. This indicates improved reported understanding, not proof of sustained organisational change. Reported applications and planned applications must remain distinguishable. A checklist is also different from a completed template or a practice in use.

# 4. Institutional capacity self-assessment

Assess both the ability to apply CDR internally and the capacity to help others. Define the organisation or unit, intended contribution, contributors and review date. Use the four areas below to prepare a realistic capacity profile—not a single score, ranking or certification.

| Area of reflection | Questions to resolve |
|---|---|
| **Digitalisation and CDR awareness** | Which activities use data and digital tools? What can staff explain, and where is learning or specialist input needed? |
| **Mission elements** | Which existing services connect with CDR and SME support? What falls within the organisation’s remit? |
| **Interests and expectations** | What benefit and contribution are sought? What support is expected from other organisations? |
| **Organisational capacity** | Who can coordinate? What time, expertise, facilities, communication channels and follow-up capacity are available? |

Support the profile with existing records. Distinguish available capacity, partial capacity, external dependencies and gaps. Interest is not a confirmed commitment. Conclude with a priority action, responsible person, resources, timeframe and evidence of completion, using the record on page 7. Discuss external needs with the country reference point and review progress after the agreed activity.

Source: Supplied chapter 3, “Baseline Needs and Lessons from the COEUS Project”, §§3.1–3.5; chapter 4, “Institutional Capacity Self-Assessment for Public Authorities and Stakeholder Organisations”, §§4.1–4.7.

# 5. Stakeholder engagement and cooperation

Cooperation brings together complementary knowledge, responsibilities and access to SMEs. Use existing networks and invite organisations relevant to a defined need. Stakeholders should contribute to preparation, delivery and review, rather than receive information only. Include SMEs so that support reflects their circumstances.

**Map contributions before assigning roles.** Record the organisation and representative, connection with the need, interests, expertise and reach, proposed contribution, constraints, contact and next step. Confirm the contribution with the organisation; distinguish interest from agreed participation.

| Engagement stage | Practical action |
|---|---|
| **Agree the purpose** | State the problem, audience and useful result sought; select the organisations whose contributions are needed. |
| **Invite and prepare** | Explain the contribution, preparation and contact route. Select relevant Handbook content, videos and Strategy guidance. |
| **Work together** | Discuss needs and alternatives through a meeting, case exercise or peer-learning activity. Invite critical feedback. |
| **Confirm and follow up** | Record decisions, responsibilities, timing and unresolved approvals. Explain how suggestions have been used. |

**Connect territories without assuming identical conditions.** The country reference point links local work with wider COEUS exchange. Share the context, resource, adaptation, result and difficulties. Assess, adapt and test an approach before transfer; confirm needs, expertise, time and support in the receiving setting. Label hypothetical cases and local adaptations clearly.

# 6. Operational uptake of the programme

Uptake means organising a feasible activity or service, to develop CDR in the territory of reference, in accordance with the goals and competences of each organisation. Distinguish staff orientation, trainer preparation, SME learning and continuing advisory support. A focused workshop is not the completion of the whole programme.

| Step | Responsibility and expected result |
|---|---|
| **1. Define and coordinate** | The adopting institution sets scope, audience, staff time and a named coordinator. |
| **2. Prepare resources and expertise** | The coordinator checks versions and access with the country reference point and confirms trainers or specialist input. |
| **3. Assess and agree support** | The institution, trainer and SME establish needs, suitable expertise, priorities and an agreed support plan. |
| **4. Deliver and mentor** | The trainer adapts content and tasks; the institution arranges participation and follow-up; the SME coordinates its own actions. |
| **5. Review and continue** | Record learning, outputs and application separately, resolve outstanding needs and connect continuation with existing work. |

**Trainer preparation requires adaptation competence:** analysing SME needs, evaluating practices, tailoring content and using appropriate teaching methods. Staff able to introduce CDR are not automatically prepared to train others. As a preparation exercise, ask the trainer to explain a session’s objective, selected resources, task and review method.

**Confirm assessment before delivery.** The supplied materials refer to both a final case-study presentation and an online examination. Agree the applicable method and any certificate arrangements with the partner. The Kit establishes no new pass mark, accreditation or authority to issue COEUS certificates.

Source: Supplied chapter 5, "Methodology for Stakeholder Engagement and the Organisation of Cooperation", §§5.1–5.7; chapter 6, "Operational Guidelines for Adopting and Implementing the COEUS Programme", §§6.1–6.8.

# 7. Assessing SME needs and tailoring support

For an institution, SME needs assessment is a means of arranging relevant support: understand the enterprise, identify suitable COEUS resources and determine who can assist. The assessment should connect the SME's circumstances with the supporting organisation's remit and capacity; it is not a requirement for every contact person to perform a specialist technical assessment.

## Establish the enterprise's context

Use the Handbook's **Questionnaire for Assessing SME Digitalization Needs and Tailoring Training Programs**, adapted by trainers to the enterprise and region. Explain its purpose and involve a representative familiar with operations, alongside staff whose learning needs are being considered.

| Assessment area | Information needed to arrange support |
|---|---|
| **Digital maturity and infrastructure** | Tools and systems in use, their maintenance and available internal IT support. |
| **Industry and specific digital needs** | Sector, specialised systems and the relevance of sector-specific examples or expertise. |
| **Culture and willingness to change** | Management's approach, organisational priorities and any existing digital strategy. |
| **Digital skills and workforce competences** | Participants' knowledge, prior training and reliance on external support. |
| **Financial resources and funding** | Available investment, resource limitations and any external support requiring confirmation. |
| **Infrastructure and access to services** | Connectivity, practical delivery constraints and openness to cooperation. |
| **Market needs and client focus** | Customers served and the digital sales or data-exchange channels used. |
| **Security, legal and regulatory aspects** | Reported awareness, sensitivity of digital activities and questions for specialist advice. |

## Translate findings into an appropriate response

Connect the technologies listed with the responsibilities attached to actual processes: data handling, security, ethical technology use, inclusion, sustainability and accountability. Keep less familiar needs visible even where an immediate concern determines the first activity.

**Choose the response to the barrier.** A knowledge gap may call for reading, a video and discussion; difficulty applying knowledge may require mentoring; specialist questions need appropriate referral; limited staff time or unclear responsibility may require an organisational adjustment. Not every difficulty is a training need.

Agree priorities with the SME, match them to suitable expertise and confirm the availability, working language and scope of assistance. The institution coordinates access and feasibility; the trainer undertakes detailed educational adaptation. The country reference point can assist with orientation and connections, including expertise elsewhere in the network.

## Record and review the support decision

Use the action-and-evidence record on page 7 to capture the context and assessment resource, priority need, support format, selected materials, responsibilities, practical result and follow-up. Separate immediate priorities, referrals and needs retained for later review. Keep contextual

assessment, baseline findings and Entry–Exit evaluation distinct; do not combine them into a new score.

Review whether the response fitted the need and what remains unresolved. Recurring findings can inform the institution's service offer, but a small participating group should not automatically be treated as representative of the whole territory.

Source: Supplied chapter 7, "Assessing SME Needs and Tailoring Support", §§7.1–7.7.

# 8. Education, workshops and mentoring resources

Assemble the resource set around the intended result. The Handbook provides content and practical tasks; its Curriculum defines learning outcomes and trainer competences; its Training Flow connects preparation, thematic learning, discussion, exercises, mentoring and assessment. The videos complement this process, while the Strategy connects it with continuing institutional support.

| Resource / activity | Use when organising support |
|---|---|
| **Module 1 Workbook** | Digital Maturity Assessment, Stakeholder Engagement Plan, Case Study Analysis and Ethical Data Management exercises: build shared understanding and prepare a support discussion. |
| **Module 2 Workbook** | Cybersecurity cases, phishing-email review, incident-response role play, risk assessment and ethical-data scenarios: organise a focused, facilitated practical session. |
| **Module 3 Workbook** | Accessibility review and testing, energy-efficiency planning, e-waste management and cooperation on sustainable practices: link a topic to an organisational task. |
| **CDR implementation exercise** | Connect the enterprise's maturity and digital activities with relevant measures and institutional support, under the agreed assessment arrangements. |

## Prepare complete learning activities

For each activity, agree on the audience, learning objective, reading or viewing, practical task and review method. Confirm who will prepare the example emails, case scenarios or worksheets: an exercise description is not necessarily a ready-to-use delivery pack. Select tasks according to needs rather than requiring every exercise in every workshop.

Use the **actual titles and locations of training recordings**, checking their relationship to the selected Handbook content. Where excerpts are used, verify the segments. Viewing should be connected with questions, discussion and application, not recorded as evidence of competence on its own.

**Illustrative workshop.** A business support organisation can arrange a Module 2 session combining relevant content, a recording and the Workbook's incident-response role play. The trainer facilitates a simulated scenario, role allocation and communication. The exercise-based plan demonstrates the work undertaken; it does not show that each SME has implemented its own operational routine.

## Connect workshops with mentoring

Mentoring should address the priorities already agreed with the enterprise. The institution confirms the mentor, scope and follow-up; the mentor uses relevant resources and checklist outputs to guide the task. Record advice, drafts and completed actions separately. Refer needs beyond the mentor's competence to an appropriate specialist.

## Make access, instructions and communication usable

Identify each selected resource's title, purpose, version where applicable, language and access location. Tell participants what is required and what is supplementary. Invitations should explain the purpose, preparation, contribution and contact route. Connect enquiries and feedback with the organiser and country reference point.

Confirm the formats actually available. Do not list translations, transcripts, captions or ready-to-use worksheets without checking them. Use clear instructions, consider alternative communication options, and resolve identified participation or access difficulties before delivery. Agree practical alternatives where needed and distinguish local adaptations from approved common materials.

**Activity resource record:** purpose and audience; selected materials; preparation and access; facilitator and practical work; expected output and review; follow-up contact. Use the record on page 7. Share feedback on common materials with the partner and use it to improve delivery.

Source: Supplied chapter 8, "Resources for Education, Workshops and Mentoring", §§8.1–8.8; chapter 5, §§5.4–5.5, for invitations, communication and feedback.

# 9. Practical tools for implementation

The institutional tools below consolidate the supplied planning aids. They support coordination and documentation; they are not new contractual deliverables, certification procedures or substitutes for specialist assessment. Use existing organisational records where equivalent fields are already available. The module checklists on page 8 concern SME application, not a separate institutional assessment standard.

## A. Readiness and coordination check

**Organisation / unit:** _____ **Activity:** _____
**Coordinator:** _____ **Partner contact / date:** _____

| Confirm before delivery | Status / next action |
|---|---|
| Purpose, remit, participant needs and expected result defined. | |
| Coordinator, expertise, staff time and practical arrangements confirmed. | |
| Selected resources, versions, language and access checked. | |
| Review, follow-up, specialist referral and approvals arranged. | |

## B. CDR support action and evidence record

Complete for each priority action in institutional capacity building, SME support or service integration. Keep separate actions and their completion states distinguishable.

| Field | Entry / evidence reference |
|---|---|
| **Action and scope**<br>Organisation, activity, audience, reference. | |
| **Need and starting position**<br>Assessment; reported and examined information. | |
| **Contribution and resources**<br>Support format, source material, adaptations. | |
| **Result and responsibilities**<br>Output, coordinator, trainer, organisational owner. | |
| **Timing and conditions**<br>Deadline, resources, approvals, dependencies. | |
| **Status and evidence**<br>Current status, evidence location, review date. | |
| **Review and next step**<br>Finding, next action, owner and timeframe. | |

**Status key:** Not yet assessed; Planned; In progress; Completed for the agreed scope; Not applicable—with the reason recorded. Missing expertise, time or evidence does not make an applicable item "not applicable". A blank entry means not yet assessed.

### C. One-page operational note

For an internal practice, record: **title and resource reference; purpose and scope; responsible role; clear instructions; questions and escalation contact; supporting records; confirmation and staff communication; review date or trigger.** Use the structure for a relevant routine or role assignment. A completed note does not, by itself, demonstrate that the practice is in use.

> **Record support and application separately.** A mentoring session may be delivered while the SME's incident sheet is still a draft. The action remains in progress until the agreed output and evidence support completion.

Source: Supplied chapter 9, "Practical Templates and Checklists for Implementation", §§9.1–9.5 and §9.7. Forms are consolidated working versions of the supplied institutional aids.

## 9. Practical tools — module checklists

Use these condensed Handbook output-and-evidence references with trainers and SMEs. Enter a status from page 7 and refer to the action record for detailed evidence. Preserve the agreed scope: completing selected items is not completion of the entire module. Consult the relevant Handbook content when interpreting an item.

| Module 1 — Basic Principles of Corporate Digital Responsibility | Status |
|---|---|
| **M1.1 Shared CDR definition.** Evidence: a short statement used internally. | |
| **M1.2 Named CDR coordinator.** Evidence: a role assignment, internal note or email. | |
| **M1.3 Basic digital-process map.** Evidence: tools, data and purpose in a one-page record. | |
| **M1.4 Sensitive-data access reviewed.** Evidence: permission note, access list or screenshot. | |
| **M1.5 Staff privacy and secure-use guidance.** Evidence: attendance and training outline. | |
| **M1.6 Incident-reporting routine.** Evidence: written actions and notification contact. | |
| **M1.7 Consent and transparency routines checked.** Evidence: updated notice, template or review, including opt-out and unsubscribe arrangements. | |
| **M1.8 External support identified.** Evidence: contacts with the purpose of assistance. | |
| **M1.9 Next steps for Modules 2 and/or 3.** Evidence: 3–5 actions, owners and timeframe. | |

| Module 2 — Privacy, Ethical Use and Security of Data | Status |
|---|---|
| **M2.1 Basic data map.** Evidence: what, where, who and why in a table or diagram. | |
| **M2.2 Access rules applied to sensitive data.** Evidence: review note or access list. | |
| **M2.3 Multi-factor authentication on critical accounts, where possible.** Evidence: screenshot or administrator confirmation. | |
| **M2.4 Privacy transparency and consent clarity.** Evidence: plain-language notice, website section, template or policy excerpt. | |
| **M2.5 Anti-phishing and safe-handling guidance.** Evidence: attendance and outline. | |
| **M2.6 Incident routine defined and communicated.** Evidence: contacts and first actions. | |
| **M2.7 Rule for external sharing of sensitive data.** Evidence: an internal instruction. | |
| **M2.8 Starting point for retention and clean-up, even if partial.** Evidence: a note for at least one data category. | |
| **M2.9 Accountability where AI/automation is used.** Evidence: purpose, review responsibility, human oversight and the ability to challenge. | |

| Module 3 — Digital Sustainability, Inclusion and Accessibility | Status |
|---|---|
| **M3.1 Digital footprint mapped.** Evidence: tools, devices, platforms and user touchpoints, covering internal and customer-facing activities. | |
| **M3.2 Energy-saving settings enabled and communicated.** Evidence: checklist and instruction. | |
| **M3.3 Basic WCAG-aligned accessibility baseline.** Evidence: content checklist or policy note. | |
| **M3.4 Key customer journey reviewed.** Evidence: checks, improvements and remaining barriers. | |

| Module 3 — Digital Sustainability, Inclusion and Accessibility | Status |
|---|---|
| **M3.5 At least two core accessibility improvements.** Evidence: screenshots or change log; e.g. alternative text, subtitles, contrast, font scaling or navigation. | |
| **M3.6 Equipment lifespan and responsible disposal practice.** Evidence: lifecycle note, recycling partner and disposal records where applicable. | |
| **M3.7 Responsible procurement principle.** Evidence: a rule covering energy efficiency, lifecycle and supplier responsibility for devices, software or services. | |
| **M3.8 Sustainability/accessibility ownership.** Evidence: named person and review schedule. | |
| **M3.9 Cooperation options identified.** Evidence: contacts and purpose of assistance. | |

Source: Supplied chapter 9, §9.6, "Handbook Checklists in a Working Format". Reference labels M1.1–M3.9 organise the same supplied items; they do not define a new assessment scale.

# 10. Monitoring, evaluation and quality assurance

Monitoring records delivery and completion; evaluation examines relevance and results; quality assurance checks resources, working arrangements and evidence and leads to improvement. Choose evidence against the intended result before the activity. Make the institution's own contribution visible without treating participation as proof of organisational change.

| Monitor | Evidence | What it shows / limit |
|---|---|---|
| **Reach and participation** | Registration and attendance. | Who participated; not learning or application. |
| **Resources and support used** | Selected materials; workshop, mentoring or referral records. | What was delivered; not understanding of a shared link or document. |
| **Experience and readiness** | Feedback on usefulness, confidence and format. | Perceptions; not demonstrated competence or implemented change. |
| **Learning** | Review questions, exercises, assessed cases or Entry–Exit responses. | Task performance or reported change, according to the instrument. |
| **Outputs and application** | Operational notes, assigned roles and evidence of communication or use. | Prepared or implemented work within scope; distinguish drafts from practice. |
| **Institutional uptake** | Service/work-plan integration, ownership and continuing activities. | Use of the approach; future commitment alone is only intention. |
| **Organisational effects** | Relevant measurements, tests and comparisons. | Defined effects where evidence supports them; a checklist alone proves neither emissions reduction nor full accessibility. |

## A proportionate review cycle

**Before:** record the starting position, scope, resources, participants, owner, expected result and review method. **During:** record delivery, difficulties, questions and adaptations. **At completion:** examine the output and collect feedback. **At follow-up:** check whether agreed practices were introduced and are used. Agree timing locally and retain unresolved needs.

## Quality checks and responsibilities

Confirm resource versions, actual video content, audience fit and clearly labelled adaptations. Preserve the distinction between principles, dimensions and modules; trainer preparation and SME learning; hypothetical cases and reported implementation. Check access and participation arrangements and invite critical feedback.

Check that descriptions, tables and figures concern the same population and period. Verify counts, denominators and scales. Keep self-reported information distinct from demonstrated performance and evidence examined. Refer conflicting source information to its responsible author; do not silently reconcile it or select the most favourable value.

The coordinator maintains the record and arranges review. Trainers or advisers assess matters within their expertise; SMEs confirm their own actions and records. The country reference point connects feedback and expertise but does not automatically certify local outputs. Assign an owner and date to each improvement action.

### Monitoring record

Add to the action record: **result examined; indicator, unit and denominator where relevant; baseline and evidence method; finding and valid response count; evidence date/reference; limitations; reviewer; improvement action and follow-up.** Reuse existing records and report only the scope supported by the evidence.

Source: Supplied chapter 10, "Monitoring Implementation, Evaluation and Quality Assurance", §§10.1–10.7.

## 11. Integrating CDR into services, policies and plans

Give CDR a defined place in the institution's continuing work. The guiding approach is **integrate rather than duplicate**: strengthen existing services, strategies and cooperation instead of creating parallel structures. The Kit supports organisational uptake and staff preparation; territorial Action Plans connect that uptake with continuation and expansion.

### Use existing points of integration

| Existing activity | Practical integration |
|---|---|
| **Advisory and mentoring services** | Include CDR in the initial discussion, select relevant resources and arrange appropriate support or referral. |
| **Digital maturity and innovation assessment** | Consider responsible technology use and complementary Handbook questions, preserving each instrument's purpose. |
| **Training and staff development** | Use the Handbook, videos and exercises within existing learning activities; confirm suitable facilitation. |
| **Innovation and business development** | Consider responsibility when discussing digital products, services and processes. |
| **Policies and institutional strategies** | Connect CDR with digitalisation, innovation, sustainability and SME support; identify a specific institutional contribution. |

A reference to CDR in a document should lead to a purpose, responsible people, resources and an activity. Distinguish those who prepare or propose a measure from those who approve and deliver it. Record proposed, agreed and implemented changes separately.

### Connect with territorial action planning

The supplied material describes five jointly developed territorial Action Plans, one per pilot site, derived from the COEUS Strategy. Their substantive areas are: continuing and extending the trainer pool; mainstreaming CDR upskilling and reskilling in SME support; integrating CDR within participating territories' S3/S4 strategies; and continuing internal capacity building.

An institution's working plan is **not automatically a COEUS territorial Action Plan**. Connect its contribution with a territorial plan where this is established, through the country reference point. The described validation, peer-review and endorsement process is not evidence that a particular measure has already been approved or implemented.

## Plan resources and continuity

Identify staff time, coordination, expertise and practical requirements. Distinguish available resources, confirmed external contributions and funding still to be secured. The supplied material discusses grants, financial instruments, vouchers, capacity-building schemes and private or public-private investment as possible categories—not guaranteed opportunities or entitlements.

Add to the action record: **existing service or policy; identified need and Strategy connection; proposed measure; selected resources; approval and delivery responsibilities; timing and funding status; evidence of uptake; review and continuation.** Keep a local organisational owner and connect the measure with existing work plans.

> **Illustrative integration measure:** prepare designated staff within an existing SME advisory service to introduce COEUS, identify CDR learning needs and connect enterprises with training or mentoring. Use the Handbook and videos, confirm partner support, and review the support arranged and outstanding needs.

Demonstrate uptake through service changes, staff preparation and actual delivery. A future commitment remains a plan until acted upon; continuity requires evidence of subsequent use. Review capacity and feedback with relevant contributors and adjust the support offer.

Source: Supplied chapter 11, “Integrating CDR into Existing Services, Policies and Action Plans”, §§11.1–11.7 and the concluding subsection on uptake and continuity.